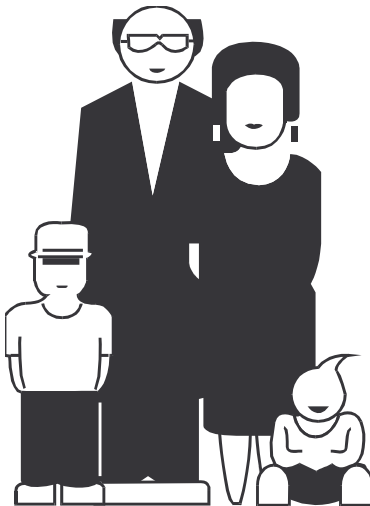


ASSIST

BASIC

User Guide

October 19, 2005



ASSIST BASIC USER GUIDE

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Introduction

The ASSIST User Guides are designed to take a user step-by-step through ASSIST functions. Because there are many different areas of specialization (i.e. Adult Services, Family and Children Services, etc.) these guides are divided into separate booklets. For Release 2, there are 6 guides:

- ASSIST Basic User Guide
- ASSIST Adult Protective Services User Guide
- ASSIST Child Protective Services User Guide
- ASSIST Supervisor/Manager Guide
- ASSIST Mentor Guide
- ASSIST County System Administrator Guide

The Basic User Guide contains instructions for procedures that are common to all areas. All groups should use this Guide.

The Adult Protective Services User Guide contains instructions for Adult Protective Services Intakes and Investigations.

The Child Protective Services User Guide contains instructions for Prevention Referral Intakes and Assessments and Child Abuse/Neglect Intakes and Assessments.

The Supervisor/Manager Guide contains instructions for procedures that can only be performed by supervisors, program supervisors, and county directors.

The Mentor Guide contains instructions for procedures that can only be performed by ASSIST Mentors.

The County System Administrator Guide contains instructions for maintaining elements of the ASSIST system at the county office level.

Using the Mouse

The following describes the different ways that a mouse is represented on your screen.

The Pointer

The pointer is the primary navigator. It controls point-click movement using either a point or an I-beam. It often looks like an arrow.



The I-Beam

The I-beam is used to insert text or numbers in any software program (for example, Word or Excel). It looks like a capital I.



The Hand

The Hand indicates when the pointer is positioned over a link. Links are indicated by hypertext, which is usually a different color from the surrounding text and underlined. Clicking on hypertext (when the pointer is the Hand) takes you to the location to which the link points (usually another web page or another location on the same web page).



The Busy Indicator

When the computer is processing input, a busy indicator, usually an hourglass, is displayed.



Left-Handed Users

Mouse buttons can be switched for left-handed users. After switching, just reverse the left (primary) and right mouse instructions.

Step	Action
1	Point at Start on your Windows 95/98 desktop.
2	Scroll up to Settings .
3	Click on Control Panel .
4	Double Click on Mouse .
5	Click on the Buttons tab.
6	Under Button configuration, click on the radio button to change to left-hand.
7	Click on OK .

Mouse Actions

The following table describes the mouse actions used when navigating the Windows 95 and ASSIST desktops.

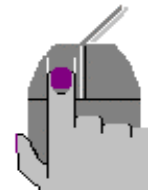
Mouse Action	Description
Point-Click	Primary mouse action
Point Double Click	Launches an application
Point-Click Type	Used to insert text or numbers
Point-Drag-Drop	Moves an icon, file, text, or number from one location to another.

Examples:



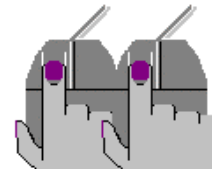
Most point-click activity is a **single**, quick click using the primary or left side of the mouse. Point and click to:

- ✓ Highlight an item
- ✓ Insert the I-beam
- ✓ Open and display case information.
- ✓ Print
- ✓ Exit



Point double-click activity uses two quick clicks of the primary or left side of the mouse. Point double-click to:

- ✓ Launch or open an application



Point-click type action is used extensively in the ASSIST application. Clicking inside a text box activates the I-beam.

1. Point inside the box.
2. Click and then release the mouse.
3. Type in your information.



Point-click-drag-drop is used to move items and text on a screen from one location to another.

1. Point the arrow over the selected item.
2. Click the mouse button and hold the button down.
3. Drag the arrow to the desired location.
4. Drop the item by releasing the mouse button.



Using the Tab Key

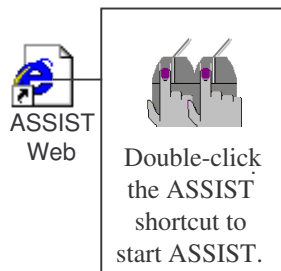
If you prefer to use the Tab key on your keyboard to move the cursor from field to field rather than clicking the mouse, this feature is available.

The ASSIST Web Page

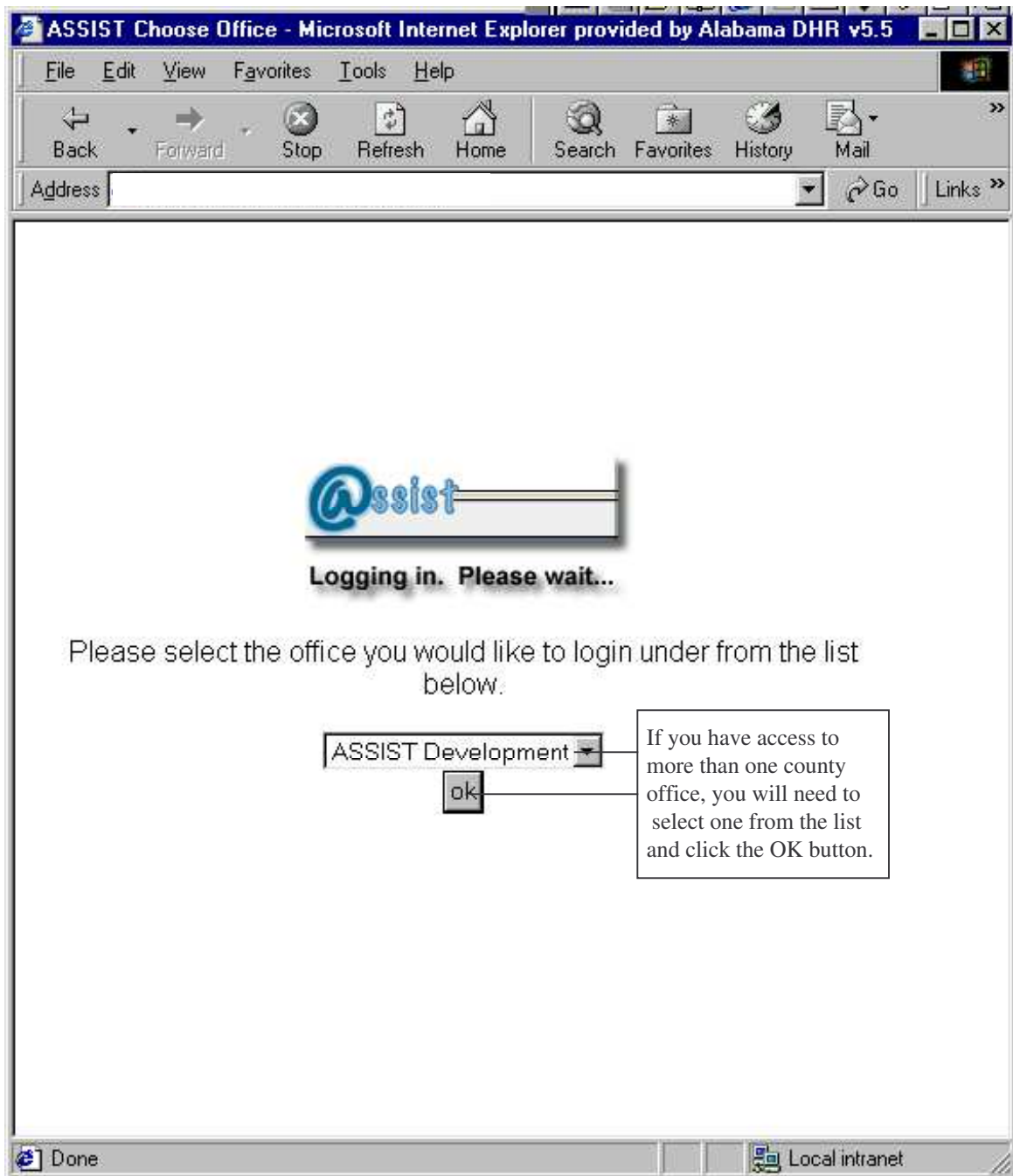
ASSIST is a web-based application. That means the application is not in your computer, but on a server that you access through a network. The network that ASSIST uses is the DHR Intranet. That is In**TRA**net, not In**TER**net. Unlike the Internet, which is a system open to anyone with a computer and internet service provider, the DHR Intranet is a closed system. Only those connected to specific network servers can access the DHR Intranet and ASSIST.

Starting ASSIST

You have been provided a shortcut for the ASSIST application. Double-click this shortcut to start ASSIST.



When you double-click the ASSIST Web shortcut, the ASSIST login web page is displayed. This page checks your network login ID (which you entered when you logged onto your Local Area Network (LAN)) to see if you are allowed to use ASSIST. You should wait while the system continues to log you into ASSIST. If you have access to more than one office, you will need to select one from the list and click the OK button.



If your login ID is in the list of people allowed to use ASSIST, the ASSIST Web Page opens.

The ASSIST Menu

The ASSIST Menu is located across the top of the ASSIST web page. It provides a means to navigate (move around) the ASSIST application. Clicking on a menu item takes you to the associated page. A red pointer indicates which page is currently visible. Your menu may not have all of the items shown below. Only menu items with functions you are allowed to access are shown. For example, Sys Admin (or System Administration) will not be available to most ASSIST users.

The screenshot shows the ASSIST web application in a Microsoft Internet Explorer browser window. The browser title bar reads "ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5". The page header includes the ASSIST logo, a date of "September 2, 2004", and a navigation bar with "Summary", "Sys Admin", and "Logout" links. A red pointer is positioned over the "Summary" link. The left sidebar contains a "Summary" section with a red pointer over the "Intakes" link, and a "Quick Q & A:" section with links for "View Summaries of:", "Intakes", "Assessments", "Investigations", "Pending Approval", and "Assignments". At the bottom of the sidebar are icons for "Search", "ERD", "Help", "Policy", and "HelpDesk". The main content area displays two case entries. The first entry is for "T-Doe, Jane" with a "Date Received" of "08/13/2004", "Category" of "CPS Intake", "Status" of "Pending", and "Primary Worker" of "Tracy Aynes". The second entry is for "T-Newton, James Allen" with a "Date Received" of "08/31/2004", "Category" of "AANE Intake", "Status" of "Accept for AANE Investigation", and "Primary Worker" of "Mr. Bruce Strickler".

Each item on the menu represents a page.

Selecting a menu item opens the page associated with that item.

The red pointer indicates which page is currently visible.

Case Name:	Date Received:	Category:	Status:	Primary Worker:
<u>T-Doe, Jane</u>	08/13/2004	CPS Intake	Pending	Tracy Aynes
<hr/>				
Case Name:	Date Received:	Category:	Status:	Primary Worker:
<u>T-Newton, James Allen</u>	08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

ASSIST Pages

ASSIST is actually made up of several web pages, each providing its own functions. There are two main types of pages in ASSIST, summary pages and data entry pages.

Summary pages have two distinct areas separated by a vertical line: the Sidebar and the Display Area. The Sidebar is to the left of the dividing line, and the Display Area is to the right.

The screenshot shows the ASSIST web application in Microsoft Internet Explorer. The browser title is "ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5". The date "September 2, 2004" is displayed in the top right. The main navigation bar includes "Summary", "Sys Admin", and "Logout". The left sidebar is titled "Summary" and contains a "Quick Q & A:" link and a "View Summaries of:" section with links to "Intakes", "Assessments", "Investigations", "Pending Approval", and "Assignments". Below these are links for "Help", "Policy", and "HelpDesk". The main display area is titled "Intake" and has buttons for "New Intake" and "Sort / Filter". It displays two case entries:

Case Name:	Date Received:	Category:	Status:	Primary Worker:
<u>T-Doe, Jane</u>	08/13/2004	CPS Intake	Pending	Tracy Aynes
<u>T-Newton, James Allen</u>	08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

Annotations on the screenshot:

- A box pointing to the sidebar: "This is the Sidebar"
- A box pointing to the main content area: "This is the Display Area."

When you click on an option in the Sidebar, you are able to view associated information in the Display Area. The Display Area also contains buttons and links. These allow you to access additional functions. Clicking on a button, such as “New Intake” or “Add Allegation”, will open the associated data entry page. A link is an underlined string of text. If you point your mouse to a link, the arrow will change to a hand. If you click on a link to a piece of work, another Summary page for that specific piece of work will open with its own Sidebar and Display Area.

The @SSIST logo in the top left corner of the Assist window acts as a “Home” button, which takes you back to the main Summary Page.

Click the @SSIST logo to go back to the previous level.

The screenshot shows the @SSIST web application running in Microsoft Internet Explorer. The browser title is "@SSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5". The date "September 2, 2004" is displayed in the top right. The interface has a blue header bar with the @ssist logo and navigation links: "Summary", "Sys Admin", and "Logout".

On the left is a sidebar with a "Summary" section. Under "View Summaries of:", there are links for "Intakes", "Assessments", "Investigations", "Pending Approval", and "Assignments". Below this are icons for "Search", "Help", "Policy", and "HelpDesk".

The main display area shows details for an intake. At the top, there's a tab labeled "Intake" and a button "New Intake". Below this, the "Case Name:" is "T-Doe, Jane". A table follows with columns "Category:", "Status:", and "Primary Worker:". The first row shows "CPS Intake", "Pending", and "Tracy Aynes".

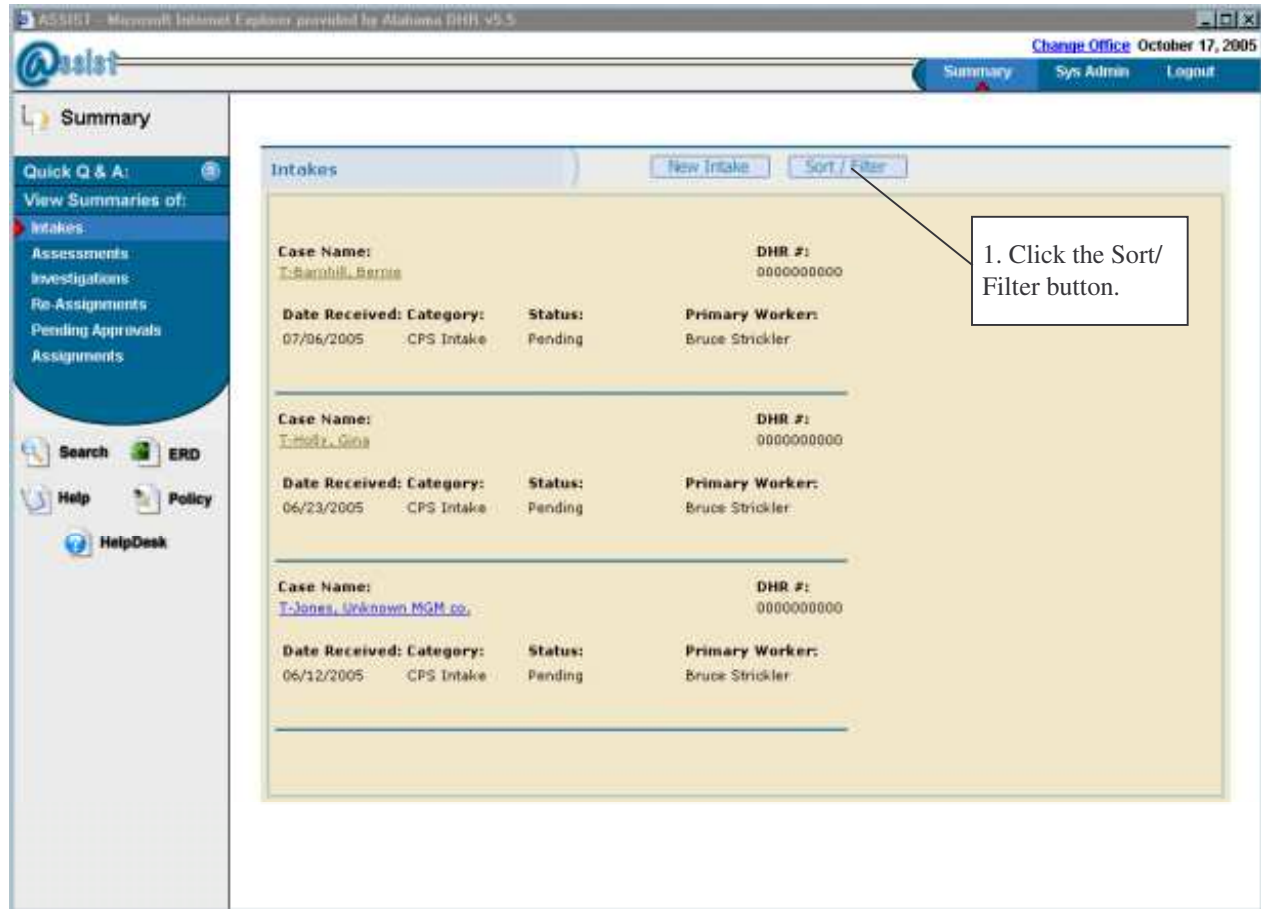
Below the table, there's another section for "T-Newton, James Allen". It includes a "Date Received:" of "08/31/2004", a "Category:" of "AANE Intake", a "Status:" of "Accept for AANE Investigation", and a "Primary Worker:" of "Mr. Bruce Strickler".

Selecting an item in the Sidebar displays associated information in the Display Area.

The Display Area provides links to both Data Entry pages and Summary Pages for specific pieces of work.

Sorting and Filtering Items on Summary Pages

You can use the Sort/Filter button on the Summary pages to make finding a specific item easier.



The screenshot shows the @asist web application interface. The left sidebar contains a 'Summary' section with a list of items: 'Quick Q & A:', 'View Summaries of:', 'Intakes', 'Assessments', 'Investigations', 'Re-Assignments', 'Pending Approvals', and 'Assignments'. Below this are icons for 'Search', 'ERD', 'Help', 'Policy', and 'HelpDesk'. The main content area is titled 'Intakes' and features a 'New Intake' button and a 'Sort / Filter' button. A callout box points to the 'Sort / Filter' button with the text: '1. Click the Sort/ Filter button.' Below the buttons is a table of intake records.

Case Name:	DHR #:
T.Barrhill, Bernie	0000000000
Date Received: 07/06/2005	Category: CPS Intake
Status: Pending	Primary Worker: Bruce Strickler
Case Name:	DHR #:
T.Holtz, Gina	0000000000
Date Received: 06/23/2005	Category: CPS Intake
Status: Pending	Primary Worker: Bruce Strickler
Case Name:	DHR #:
T.Jones, Unknown MGM co.	0000000000
Date Received: 06/12/2005	Category: CPS Intake
Status: Pending	Primary Worker: Bruce Strickler

Sort/Filter Intakes -- Web Page Dialog

Sort/Filter Intakes

OK Cancel

Sort Criteria

Case Name: [dropdown]
Category: [dropdown]
Primary Worker: [dropdown]

Date Received: [dropdown]
Status: [dropdown]

Filter Criteria

Category Type: [dropdown]
Status Type: [dropdown]

HelpDesk

3. Click the OK button.

2a. If you want to Sort, select ASC (for ascending) or DESC (for descending) for the criteria by which you want to sort.

2b. If you want to Filter, select the item type you want displayed.

http://n706177/assist/editPopUpFianeset.jsp?openPage=pages/init/etli_summary_sort.jsp&pageF# Local intranet

Special Items on the Sidebar

1. The Quick Q & A link is located *above* the list of options and is used to document calls that do not relate to DHR work. Q & A is covered in more detail in the Adult Protective Services and Child Protective Services user guides.



2. *Below* the list of options are five buttons:

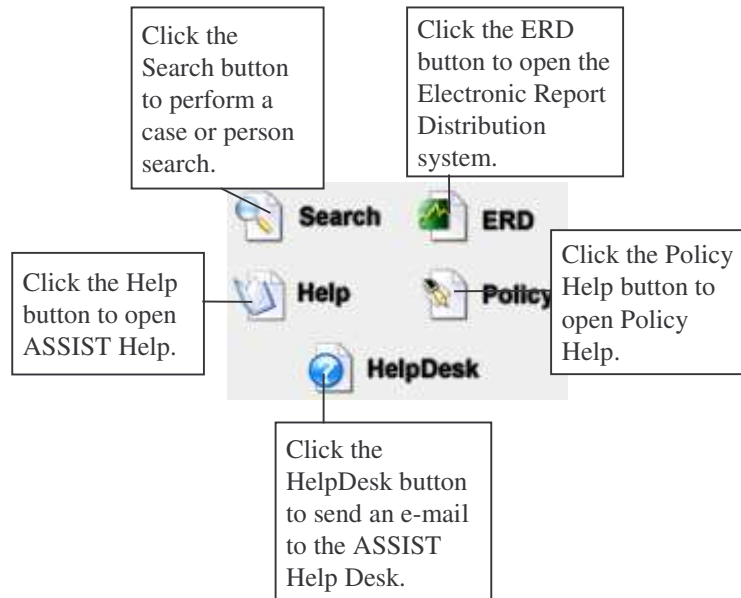
a. The Search button opens the search page, which is used to perform searches for cases, people, and providers.

b. The ERD button opens the Electronic Report Distribution system, which displays reports generated by ASSIST, ACWIS, and FSS.

c. The Help button opens the ASSIST Help feature, which provides assistance in using ASSIST.

d. The Policy button provides a link to DHR's Policy Help for Adult or Family and Children Services.

e. The HelpDesk button allows you to send an email message to the ASSIST Help Desk.



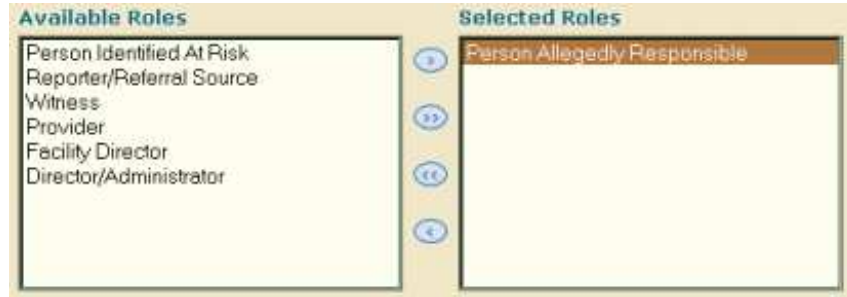
Data entry pages have fields into which you can enter information. Each field has a label so that you know what kind of information to enter. If a field is required (i.e., you must enter something in the field in order to save), there will be a red asterisk after the field name. Once you have completed entering the information on a Data Entry page, you can click the OK button to save your changes and exit the page, or click the Cancel button to exit the page without saving.

Data entry pages contain data entry fields that are used to collect information.

Text boxes allow you to type data in your own words.

Drop-down boxes allow you to select values from a list.

Multi-select boxes allow you to select more than one value from a list.



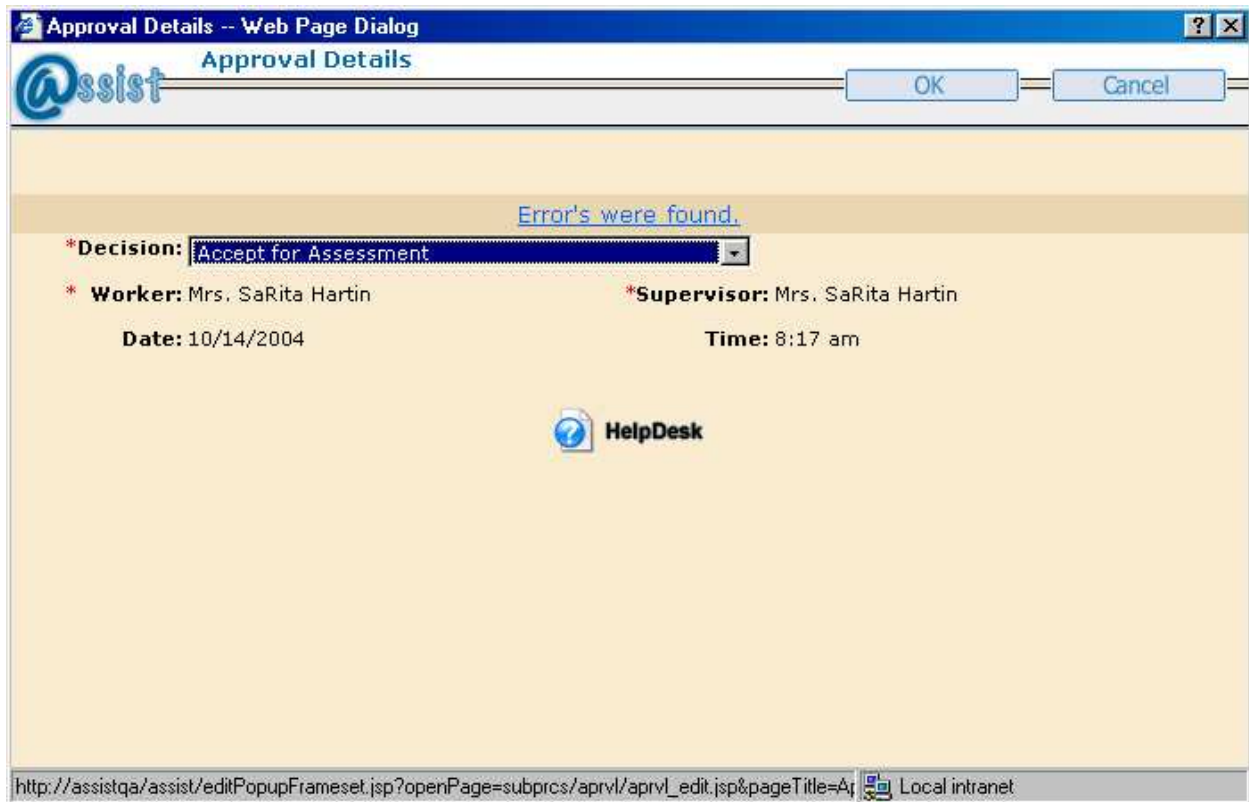
ASSIST Error Messages

ASSIST error messages are generated when there has been a data entry error or when there is not enough information available to complete a piece of work (e.g., you cannot approve an assessment/investigation until the Person Identified at Risk has been contacted). There are two methods used to notify you when an error has occurred.

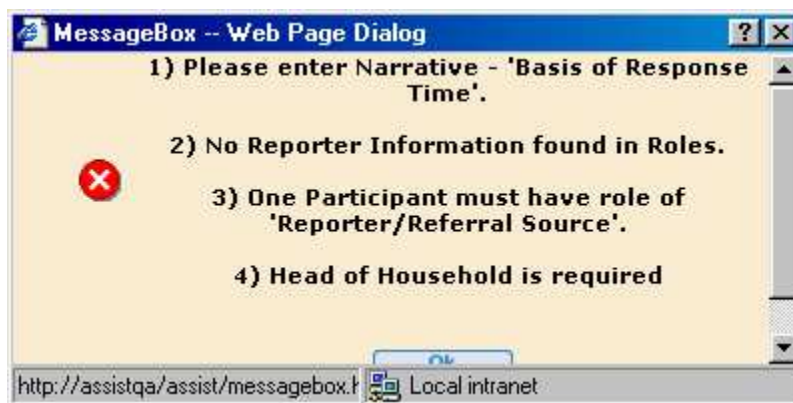
When there has been a data entry error, like required data missing or invalid time format, a small box will display on your screen notifying you of the error, and the field(s) in error will be highlighted. Click the OK button on the message box to return to the page and correct the error(s).



When the error involves the system being unable to find valid information it needs to complete a function, a link will be displayed on the page with the words “Errors were found.”



You must click the “Errors were found” link to get a description of the items in error.



NOTE: You can print this list by holding the Ctrl key down while pressing P on the keyboard. When the Print dialog box opens, click the OK button.

Assignments

Purpose: Assignments control who can work on cases and allow supervisors to distribute work.

Overview: Intakes, Investigations, and Assessments are attached to workers using Assignments. An open case must have at least a Primary and a Supervisor assignment. A case can have several assignments in addition to the Primary and Supervisor assignments. Workers can assign INTAKES to anyone in their own county. Supervisors and Managers can assign and reassign intakes AND investigations/assessments to anyone in their county AND to Supervisors and Managers in other counties.

Creating a New Intake, Investigation, or Assessment Assignment

Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment, or investigation. This page is accessed from the Intake page, Assessments page, or Investigations page. To get to the Intake, Assessment, or Investigation page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Quick Q & A:

Available Pages:

- Initial**
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search
 ERD

Help
 Policy

HelpDesk

Case Name: T-Newton, James Allen

DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Initial

Intake Information

Intake Date: 08/31/2004 08:39 AM **DHR#:** 123456789 **Microfilm#:**

Category: AANE Intake **Type:** APS In-Home

Contact Method: Phone **Description:** Own Home - Alone

Case Name: T-Newton, James Allen

Assignment/Request

provided by the reporter.

1. Select Assignments from the Sidebar.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Case Name: T-Newton, James Allen
DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments**

Search ERD
 Help Policy
 HelpDesk

Assignments 2. Click the Add button.

Start	End	Type	Worker	What	Office
09/01/2004 10:22 AM		<u>Primary</u>	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Primary	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Supervisor	Tracy Aynes	Intake 08/31/2004	ASSIST Development

New Assignment -- Web Page Dialog ? X

Assignment Data

3. Select the type of Assignment.

5. Click the OK button.

Start Date: 09 / 02 / 2004 End Date: / / Type: *
 Worker: *

4. Select the person to whom you wish to make an Assignment.

Date format = mm/dd/ccyy HelpDesk

http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asgn_edit.jsp&pageTitle=New Assignment Local intranet

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search

ERD

Help

Policy

HelpDesk

Case Name: T-Newton, James Allen

DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** M

Assignments Add

Start	End	Type	Worker	What	Office
09/02/2004 10:35 AM		Secondary	Mr. Frank Ellis	Intake 08/31/2004	ASSIST Development
09/01/2004 10:22 AM		Primary	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Primary	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Supervisor	Tracy Aynes	Intake 08/31/2004	ASSIST Development

The new assignment displays on the Assignments page.

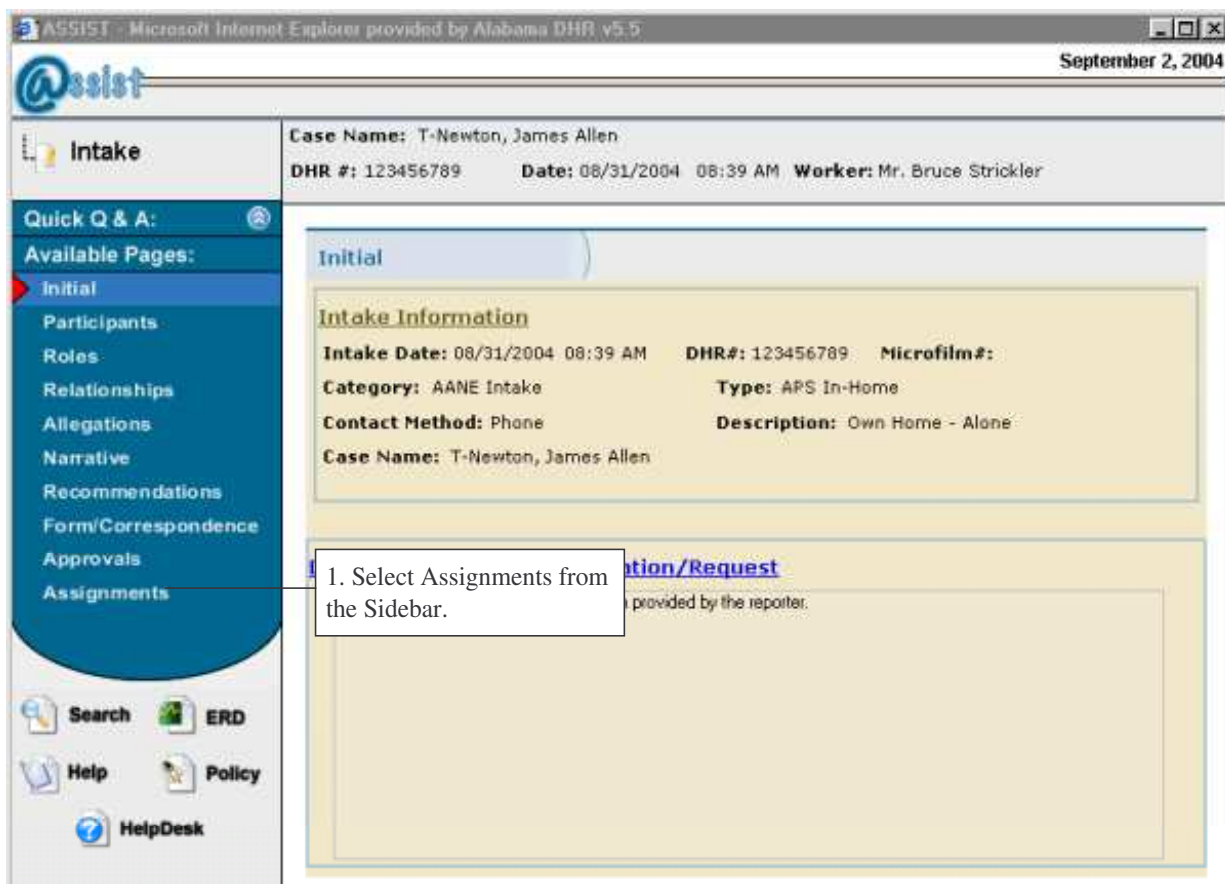
NOTE: When an intake, investigation, or assessment is assigned to someone, a supervisor assignment is created for everyone up their supervisory chain.

Closing an Intake, Investigation, or Assessment Assignment

Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment, or investigation. This page is accessed from the Intake page, Assessments page, or Investigations page. To get to the Intake, Assessment, or Investigation page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.



ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Case Name: T-Newton, James Allen
DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments**

Search ERD
 Help Policy
 HelpDesk

Assignments

2. Click the link to the assignment you want to close.

Start	End	Type	Worker	What	Office
09/02/2004 10:35 AM		Secondary	Mr. Frank Ellis	Intake 08/31/2004	ASSIST Development
09/01/2004 10:22 AM		Primary	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Primary	Mr. Bruce Strickler	Intake 08/31/2004	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Supervisor	Tracy Aynes	Intake 08/31/2004	ASSIST Development

Edit Assignment Information -- Web Page Dialog OK Cancel

Assignment Details

Start Date: 09 / 02 / 2004 **End Date:** / / **Type:** Secondary

Worker: Mr. Frank Ellis (ASSIST Development)

3. Enter the date the assignment ended.

4. Click the OK button.

Date format = mm/dd/ccyy

HelpDesk

http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asgn_edit.jsp&pageTitle=Edit Assign Local intranet

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

@ssist

Intake

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments**

Search ERD

Help Policy

HelpDesk

Case Name: T-Newton, James Allen

DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Assignments Add

Start	End	Type	Worker	What
09/02/2004 10:35 AM		Secondary	Ms. Patricia Roberts	Intake 08/31/2004
09/02/2004 10:35 AM	09/02/2004 01:22 PM	Secondary	Mr. Frank Ellis	Intake 08/31/2004
09/01/2004 10:22 AM		Primary	Mr. Bruce Strickler	Intake 08/31/2004
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Primary	Mr. Bruce Strickler	Intake 08/31/2004 Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Supervisor	Tracy Aynes	Intake 08/31/2004 ASSIST Development

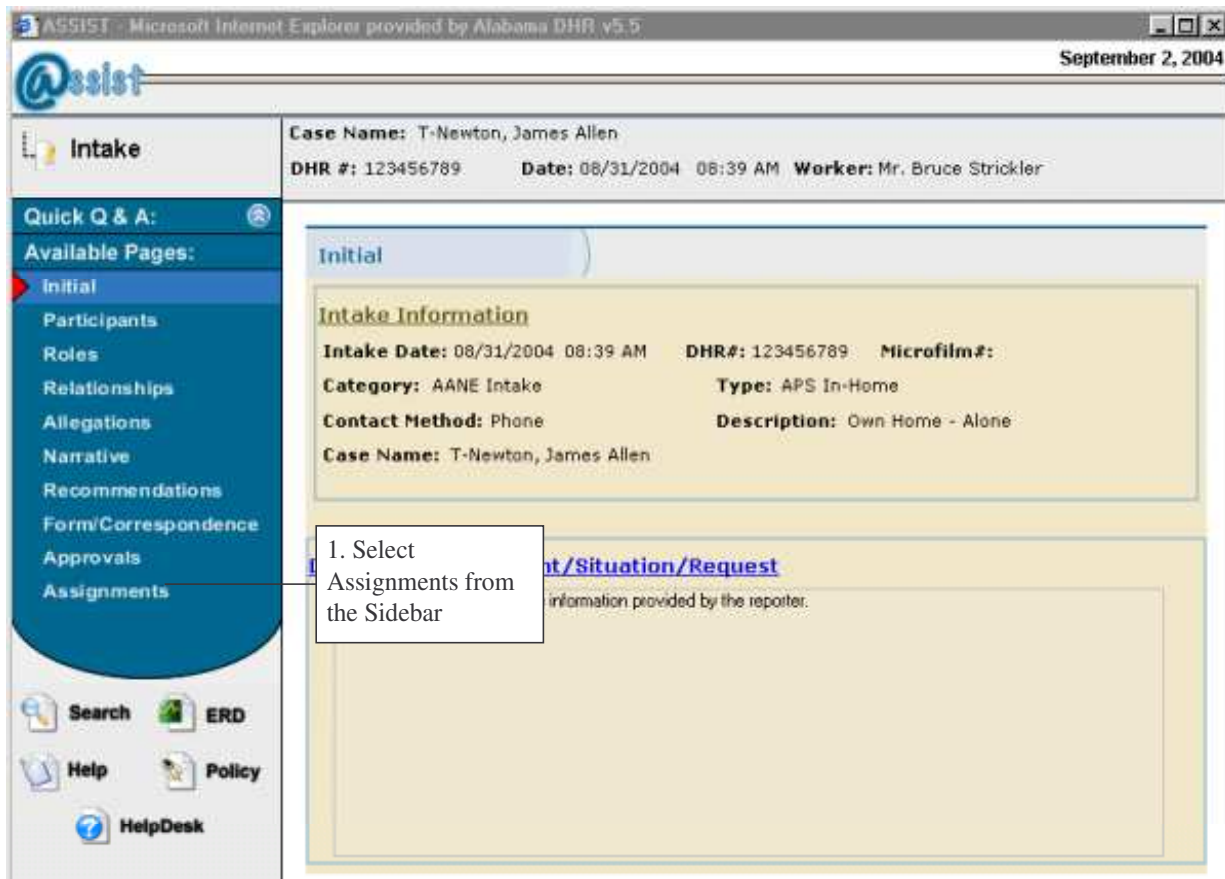
The assignment is still displayed, but with an end date, indicating that it is not a current assignment. Note that the link to the assignment is gone, so it cannot be changed.

Reassigning an Individual Intake, Investigation, or Assessment

Individual Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment or investigation. This page is accessed from the Intake page, Assessment page, or Investigation page. Supervisors and Managers can reassign multiple intakes, assessments, or investigations at a time using the Re-Assignments page (see Reassigning Multiple Intakes, Investigations, or Assessments on page 29). To get to the Intakes, Assessments, or Investigations page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.



ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Case Name: T-Newton, James Allen
DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments**

Search ERD Help Policy HelpDesk

Assignments

2. Click the link to the assignment you want to reassign.

Start	End	Type	Worker	What	Office
09/02/2004 10:35 AM		Secondary	Mr. Frank Ellis	Intake	ASSIST Development
09/01/2004 10:22 AM		Primary	Mr. Bruce Strickler	Intake	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Primary	Mr. Bruce Strickler	Intake	ASSIST Development
08/31/2004 08:40 AM	08/31/2004 03:17 PM	Supervisor	Tracy Aynes	Intake	ASSIST Development

Edit Assignment Information -- Web Page Dialog

Assignment Details

OK Cancel

4. Click the OK button.

Start Date: 09 / 02 / 2004 End Date: / / Type: Secondary

Worker: Mr. Frank Ellis (ASSIST Development)

Date format = mm/dd/ccy

3. Select the name of the person to whom you want to assign the work. (This field defaults to the person currently holding the assignment.)

HelpDesk

http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asn_edit.jsp&pageTitle=Edit Assign Local intranet

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments**

Search ERD

Help Policy

HelpDesk

Case Name: T-Newton, James Allen

DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Assignments [Add](#)

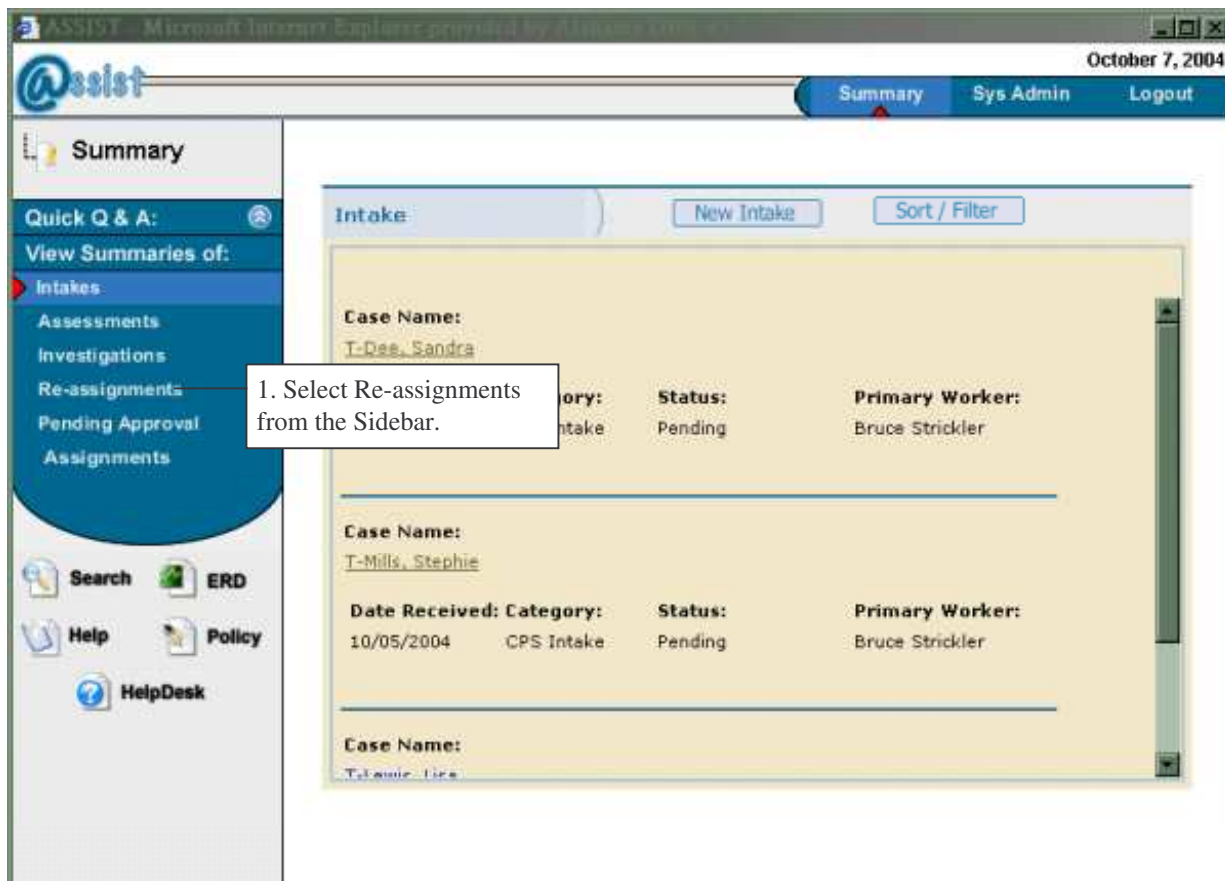
Start	End	Type	Worker	What	
09/02/2004 10:35 AM		<u>Secondary</u>	Ms. Patricia Roberts	Intake	A Development
<hr/>					
09/02/2004 10:35 AM	09/02/2004 01:22 PM	<u>Secondary</u>	Mr. Frank Ellis	Intake	A Development
<hr/>					
09/01/2004 10:22 AM		<u>Primary</u>	Mr. Bruce Strickler	Intake	A Development
<hr/>					
08/31/2004 08:40 AM	08/31/2004 03:17 PM	<u>Primary</u>	Mr. Bruce Strickler	Intake	A Development
<hr/>					
08/31/2004 08:40 AM	08/31/2004 03:17 PM	<u>Supervisor</u>	Tracy Aynes	Intake	A Development

The assignment is listed on the Assignments page with its new worker.

The assignment to the original worker is still displayed, but with an End Date, indicating it is not a current assignment.

Reassigning Multiple Intakes, Investigations, or Assessments

If you are a supervisor, there may be times when you need to redistribute a worker's intakes, investigations, and assessments. Doing this could take a long time if you reassign each piece of work individually. There is a faster way to reassign the work if you want to reassign multiple pieces of work to the same worker. This is done from the Re-assignments page. This page provides the means to reassign all or part of a worker's intakes, investigations, or assessments to another worker. For example, you could redistribute one worker's 12 assessments among four other workers by making four re-assignments (about three per worker) rather than opening each of the 12 assessments and using the Assignment page to reassign them individually. To open the Re-assignments page from the ASSIST Summary page:



ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 October 7, 2004

@ssist Summary Sys Admin Logout

Summary

Quick Q & A:

View Summaries of:

- Intakes
- Assessments
- Investigations
- Re-assignments**
- Pending Approval
- Assignments

Search
 ERD

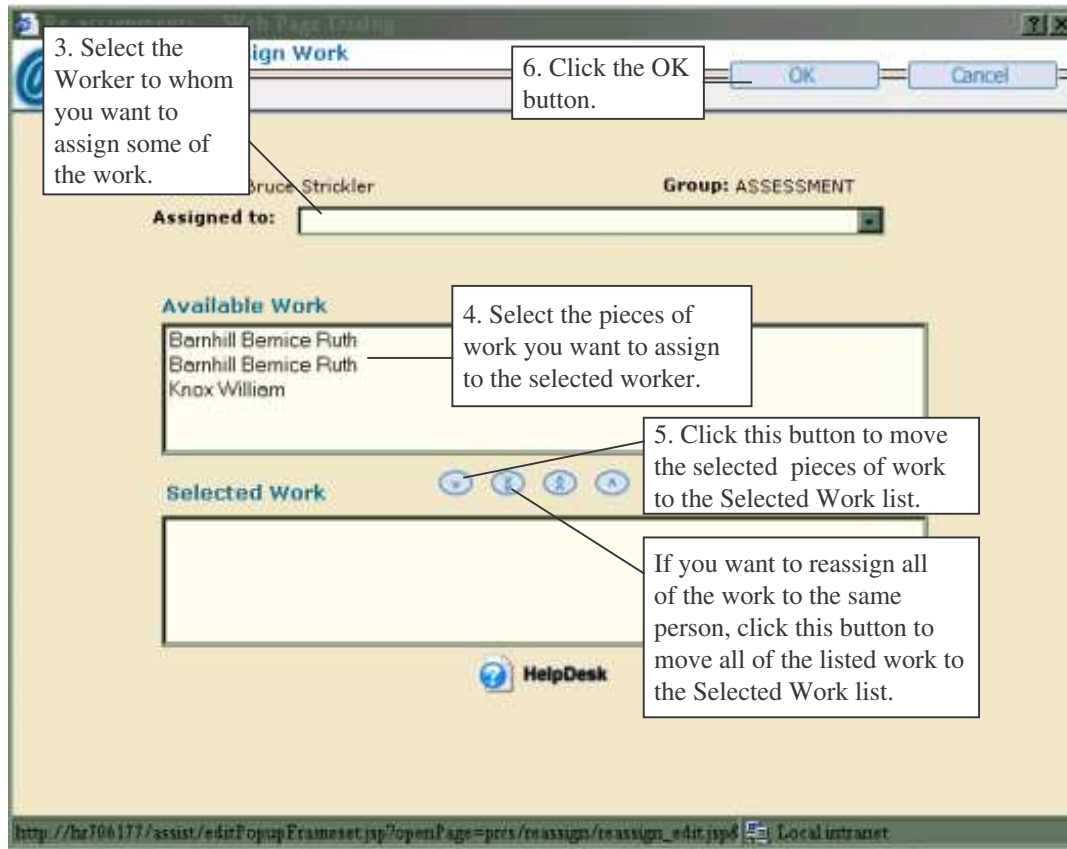
Help
 Policy

HelpDesk

Re-Assignments

Worker Name	Office	Groups
Bradley Brown	1	AANE Intake(W) Investigation(W)
Bruce Strickler	1	AANE Intake Assessment CPS Intake Investigation SysAdmin
David Dillion	1	AANE Intake(W) Assessment(W) CPS Intake(W) Investigation(W)
Deepali Rastogi	Office	Groups

2. Find the worker whose work you want to reassign and select the type of work it is.



Assigning/Reassigning Work to Another County

There will be times when you will need to transfer work to another county. Supervisors and managers have the capability to reassign intakes, investigations, and assignments to other counties. This is done the exact same way as an individual reassignment within the county, except you (as a supervisor or manager) will be able to see supervisors and managers from other counties in the Worker list on the Assignment Details page. To transfer a piece of work to another county, you need to transfer the PRIMARY assignment to a supervisor or manager in that county.

Edit Assignment Information -- Web Page Dialog

Assignment Details

OK Cancel

Start Date: 02 / 25 / 2005 End Date: / / Type: Primary

Worker: *

Date format = mm

The Worker list shows a worker's name and office. To transfer a piece of work to a different office, select a name/office pair for that office.

Strickler, Bruce (ASSIST Development)
Strickler, Bruce (ASSIST Development)
Switzer, Barry (ASSIST Development)
Taylor, Robert (ASSIST Development)
Three, Trainer Supervisor(ASSIST Development)
Three, Mentor Worker(ASSIST Development)
Two, Mentor Supervisor(ASSIST Development)
Tyler, Veronica (ASSIST Development)
VanderVeer, Maxine (ASSIST Development)
Vaughn, Sherry (ASSIST Development)
Williams, Jenny (ASSIST Development)
Yancey, William (ASSIST Development)

http://assisttrain/assist/editPopupFrameSet.jsp?openPage=subproc/assign/asn_edit.jsp;pageTitle=Edit Assig Local intranet

NOTE: Workers only see people in their office on this list. For supervisors and managers, the people are grouped by office. Your office appears at the top of the list followed by the rest of the offices in alphabetical order. Within each office, people are grouped alphabetically by last name.

Searches

Purpose: The purpose of Searches is to allow you to find people and cases that have been entered into the ASSIST database.

Overview: There are two types of searches in ASSIST: Required Searches and On-Demand Searches.

Required searches are performed when you are verifying participants in an intake or case. These searches are extremely important. They help prevent having more than one record for a person or family.

On-Demand Searches are searches that you can conduct at any time.

Opening the Search Page

Prior to completing an assessment or investigation, you must search for all of the participants to see if they are already in the ASSIST database. To do this, you must click the “Verified” link beside the participant name. This will start a search by name for the participant. This search can be done in the intake or in the assessment/investigation.

When a supervisor accepts an intake for assessment or investigation, a Case Search is automatically initiated and the case is searched for by name.

For On-Demand Searches, you need to click the Search button located below the Sidebar.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

September 2, 2004

Summary Sys Admin Logout

Summary

Quick Q & A:

View Summaries of:

- Intakes
- Assessments
- Investigations
- Pending Approval
- Assignments

Search Help HelpDesk

Intake New Intake Sort / Filter

Case Name:	Date Received:	Category:	Status:	Primary Worker:
T-Doe, Jane	08/13/2004	CPS Intake	Pending	Tracy Aynes
	08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

Click the Search button to open the Search page for an On-Demand Search.

Case Searches

Required Case Searches

Purpose: Required Case Searches allow you to determine if a case record already exists for a person or family.

Overview: If you have a new intake and find that a case already exists for the person or family, **you do not want to create a new case!** You want to create a link between the new intake and the existing case. This is done by selecting (highlighting) the existing case on the Search page and clicking the OK button.

The Search page will open automatically when you approve an intake. An initial search will already have been performed based on just the case name. The results of this search are displayed when the Search page opens.

The screenshot shows the 'Case Search' window. At the top, there are buttons for 'Reset', 'Search', 'OK', and 'Cancel'. Below these are input fields for 'Last Name' (pre-filled with 'Jones'), 'First Name' (pre-filled with 'Jane'), 'DHR Number', 'Office' (a dropdown menu), 'Assist Id', 'Provider name', and an 'Intake' checkbox. A table below the inputs shows search results with columns 'Provider / Case Name', 'DHR Number', 'Office', and 'Type'. The table currently displays 'No matching records found'. Callout boxes provide instructions: 'Name information is pre-filled when the Case Search page opens.' points to the name fields; 'Click the Reset button to clear the search criteria fields.' points to the 'Reset' button; 'If you want to perform another search using other criteria, enter the new criteria and click the Search button.' points to the 'Search' button; 'If an existing case was found, select (highlight) the case in the list, then click the OK button. If no case was found, just click the OK button to create a new case. See the Supervisor Guide for detailed instructions on approving intakes and creating/linking cases.' points to the 'OK' button; and 'The first search (based on the case name) has already been performed when the Search page opens.' points to the 'No matching records found' message.

Name information is pre-filled when the Case Search page opens.

Click the Reset button to clear the search criteria fields.

If you want to perform another search using other criteria, enter the new criteria and click the Search button.

If an existing case was found, select (highlight) the case in the list, then click the OK button. If no case was found, just click the OK button to create a new case. See the Supervisor Guide for detailed instructions on approving intakes and creating/linking cases.

The first search (based on the case name) has already been performed when the Search page opens.

Provider / Case Name	DHR Number	Office	Type
No matching records found			

On-Demand Case Searches

Purpose: On-Demand Searches allow you to search for specific people or cases in the ASSIST database any time the need arises.

Overview: On-Demand Case Searches are available through the Search button located at the bottom of the Sidebar.

Case Name:	Date Received:	Category:	Status:	Primary Worker:
T-Doe, Jane	08/13/2004	CPS Intake	Pending	Tracy Aynes
	08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Search Cancel

Last Name: First Name:

DHR Number: Office: Assist Id:

Provider name: Intake: ☐

Click the Reset button if you want to clear the search criteria fields.

2. Enter information that matches information you expect to be in the record you want.

If you want to find an intake instead of a case, select the Intake check box (box should be checked).

3. Click the Search button.

Click the Cancel button to exit the page without conducting a search.

SEARCH TIP: If you know the DHR Number or the ASSIST ID for the case you want, use those instead of the name fields. This will return only the case you want, where using names can be expected to return a larger number of records which you will have to eliminate one-by-one.

SEARCH TIP: When you enter a Provider Name, the search returns a list of case names containing any of the words from the Provider Name.

SEARCH TIP: If you only want to search for cases in a specific county, Select the county from the Office drop-down list.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any case where the first name was Jane and the last name that starts with Jon.

Here is an example of case search results.

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

A search for a last name of Jones and no first name...

Reset Search Cancel

Last Name: Jones First Name:

DHR Number: Office: Assist Id:

Provider name: Intake: ☐

Provider / Case Name	DHR Number	Office	Type	Status
Jones, Gloria	6545646547	ASSIST Development	F	Closed
Jones, Joey	55542	ASSIST Development	F	
Jones, Martha	14-252	ASSIST Development	A	Closed
Jones, Z	11111111111111	ASSIST Development	F	

...returns records where the last name was Jones.

Person Searches

Required Person Searches

Purpose: Required Person Searches allow you to determine if a person you are about to add to the database is already in there.

Overview: If you are verifying a person (see Verifying Participants in the CPS or APS user guide) and find that they are already in the database, **you do not want to add them again!** You want to create a link between the person in the intake, assessment or investigation and the already existing person. This is done by selecting (highlighting) the existing person on the Search page and clicking the OK button.

The Search page will open when you click "Verified" by a participant's name. An initial search will already have been performed based on the participant's name. The results of this search are displayed when the Search page opens.

The screenshot shows a 'Person Search' window with the following elements and callouts:

- Callout 1:** 'Name information is pre-filled when the Search page opens.' points to the 'Last Name' field containing 'Jones'.
- Callout 2:** 'Click the Reset button to clear the search criteria fields.' points to the 'Reset' button.
- Callout 3:** 'If you want to perform another search using other criteria, enter the new criteria and click the Search button.' points to the 'Search' button.
- Form Fields:** Last Name: Jones, First Name: Jane, SSN: [empty], Roles: [dropdown], Person ID: [empty], Gender: [dropdown], DOB: [empty].
- Buttons:** Reset, Search, OK, Cancel.
- Table:** A table with columns: Type, Name, Gender, Birth Date, County. Below the header, it says 'No matching records found'.
- Callout 4:** 'The first search (based on the name) has already been performed when the Search page opens.' points to the 'No matching records found' message.
- Callout 5:** 'If an existing person was found, select (highlight) the name in the list, then click the OK button. If no one was found, just click the OK button to create a new record.' points to the table area.

On Demand Person Searches

Purpose: On-Demand Searches allow you to search for specific people or cases in the ASSIST database any time the need arises.

Overview: On-Demand Person Searches are available through the Search button located at the bottom of the Sidebar.

Date Received:	Category:	Status:	Primary Worker:
08/13/2004	CPS Intake	Pending	Tracy Aynes
08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Cancel

Last Name: First Name:

DHR Number: Office: Assist Id:

Provider name: Intake:

2. Select Person from the Search Window menu.

SEARCH TIP: Only intake, assessment or investigation participants that have been verified will be found in a person search.

SEARCH TIP: Only select a role if you only want to find the person if they have that role. If you enter a role as a search criteria, and that person is in the database (but not with that role), you will not find the person.

SEARCH TIP: You can search for SSN, Person ID, and DOB. You should be aware, however, that it is possible for an existing person record to not have this information. Even if all of the other search criteria match, a record will not be returned if an item you included as criteria was not entered on the record.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any record where the first name was Jane and the last name that starts with Jon.

Here is an example of person search results.

Search - Microsoft Internet Explorer provided by [unclear]

Case Person Worker

Searching for a last name of Jones and a first name of Jane...

Reset Search Cancel

Last Name: Jones First Name: Jane SSN: Roles: Person ID: DOB: Gender:

Type	Name	Gender	Birth Date	County
MFONE -	JOHNS, JENA R			
MFONE -	JOHNS, JOANIE			
MFONE -	JONES, JAN			
AKA -	SMITH, JANE			
PRSN -	JONES, JANE C			
PRSN -	JONES, JANE			
AKA MFO	JONES, JANE			
MFONE -	JONES, JEAN	Female	00/00/0000	
MFONE -	Jones, Jean	Female	00/00/0000	
MFONE -	JONES, JENNY	Female	00/00/0000	
MFONE -	JONES, JOAN	Female	00/00/0000	
MFONE -	Jones, Joanne	Female	00/00/0000	
MFONE -	Jones, Joanne	Female	00/00/0000	
MFONE -	JONES, JOHN			
MFONE -	JONES, JOHN			
MFONE -	JONES, JOHN			

...returns matches to AKA (Also Known As) names (Jane Smith's maiden name was Jones).

...returns PRSN (exact) matches to the search criteria.

...returns MFONE (sound alike or close spelling) matches to the search criteria.

c/o ME, Apt. # , 1223123 123

Worker Searches

Purpose: Worker Searches allow you to search for people who are workers, supervisors, or other ASSIST users.

Overview: Worker Searches are available through the Search button located at the bottom of the Sidebar.

The screenshot shows the ASSIST web application in a Microsoft Internet Explorer browser window. The title bar reads "ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5". The date "September 2, 2004" is displayed in the top right corner. The main navigation bar includes "Summary", "Sys Admin", and "Logout" buttons. The left sidebar contains a "Summary" section with a "Quick Q & A:" link and a "View Summaries of:" menu. The menu options are "Intakes", "Assessments", "Investigations", "Pending Approval", and "Assignments". Below the menu are links for "Search", "Help", and "HelpDesk". The main content area is titled "Intake" and includes "New Intake" and "Sort / Filter" buttons. It displays a table of intake cases with the following data:

Case Name:	Date Received:	Category:	Status:	Primary Worker:
T-Dos, Jane	08/13/2004	CPS Intake	Pending	Tracy Aynes
	08/31/2004	AANE Intake	Accept for AANE Investigation	Mr. Bruce Strickler

A callout box points to the "Search" button in the sidebar with the text: "1. Click the Search button to open the Search page for an On-Demand Search."

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Search

Last Name: First Name:

DHR Number: Office: Assist Id:

Provider name: Intake: ☐

2. Select Worker from the Search Window menu.

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Search Cancel

Last Name: First Name:

Person ID:

Click the Reset button if you want to clear the search criteria fields.

3. Enter information that matches the information you expect to be in the record you want.

4. Click the Search button.

Click the Cancel button to exit the page without conducting a search.

SEARCH TIP: You can search for Person ID. You should be aware, however, that it is possible for an existing person record to not have this information. Even if all of the other search criteria match, a record will not be returned if an item you included as criteria was not entered on the record.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any record where the first name was Jane and the last name that starts with Jon.

Here is an example of worker search results.

Search - Microsoft Internet Explorer provided by AT&T Worldnet

Searching for a last name of Brown and no first name...

Case Person **Worker**

Reset Search Cancel

Last Name: First Name:

Person ID:

Type	Name	Office	Phone	
WRKR -	Brown , Anne	ASSIST Development	(334)242-1310	c/o , Apt. # P.O.Box 304000 36130-4000
WRKR -	Brown , Brad	ASSIST Development	(334)242-1310	c/o , Apt. # P.O.Box 304000 36130-4000
WRKR -	Brown , Bradley	ASSIST Development	(334)242-1310	c/o , Apt. # P.O.Box 304000 36130-4000

... returns all workers with a last name of Brown.

Special Narrative Types

Purpose: There are special types of narrative that apply to more than one functional area in ASSIST. This section describes these narrative types. Narrative types that apply only to a particular function in ASSIST are covered in the guide for that function.

Overview: Some narrative types are specific to a particular type of work. First Victim Contact, for example, applies only to CPS Assessments or APS Investigations. Other types of narrative are pertinent to all types of work. Alerts and Directions would be useful to anyone who is planning a visit to the client's home.

Alerts

An Alert is used to inform workers of any dangerous conditions that exist in a home or other location they might visit during the course of their work. If the Reporter/Referral Source informs the intake worker that a potential danger exists (such as a vicious dog on the property), the intake worker should enter an Alert to let the Assessment or Investigation worker know about the situation.

Alerts are entered and maintained from the Narrative page. To get to the Narrative page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select the type of work (Intakes, Assessments, or Investigations) from the Sidebar.
3. Click the name of the piece of work you want to open.

You are now ready to open the Narrative page. This example involves an intake, but the steps are identical for other types of work.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 Change Office June 1, 2005

Intakes

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search ERD

Help Policy

HelpDesk

Case Name: T-Lorrillard, Phyllis

DHR #: **Date:** 11/30/2004 01:28 PM **Worker:** Robert Taylor

Initial

Intake Information

Intake Date: 11/30/2004 01:28 PM **DHR#:** **Microfilm#:**

Category: CPS Intake **Type:** Family

Description: Single Female

Description of Incident/Situation/Request

Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrillard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.

1. Select Narrative from the Sidebar.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 Change Office June 1, 2005

Intakes

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search ERD

Help Policy

HelpDesk

Case Name: T-Lorrillard, Phyllis

DHR #: **Date:** 11/30/2004 01:28 PM **Worker:** Robert Taylor

Narrative [Add Narrative](#)

Description of Incident/Situation/Request

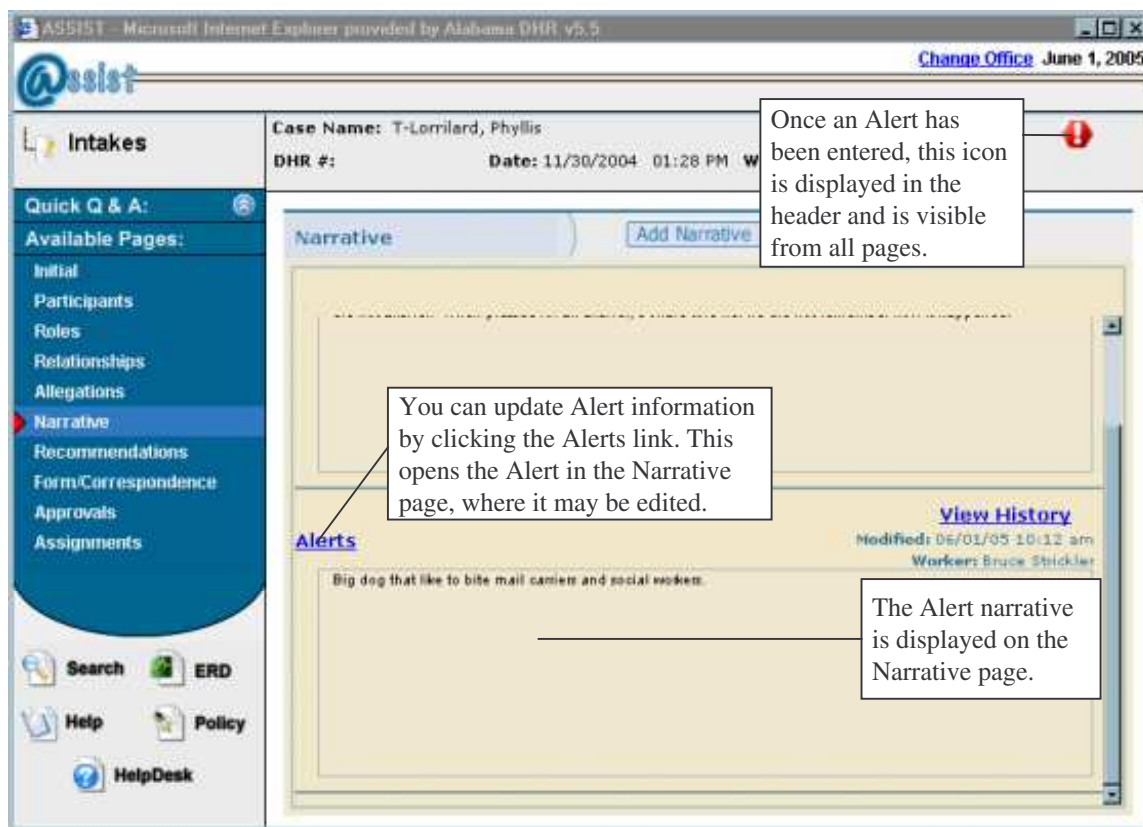
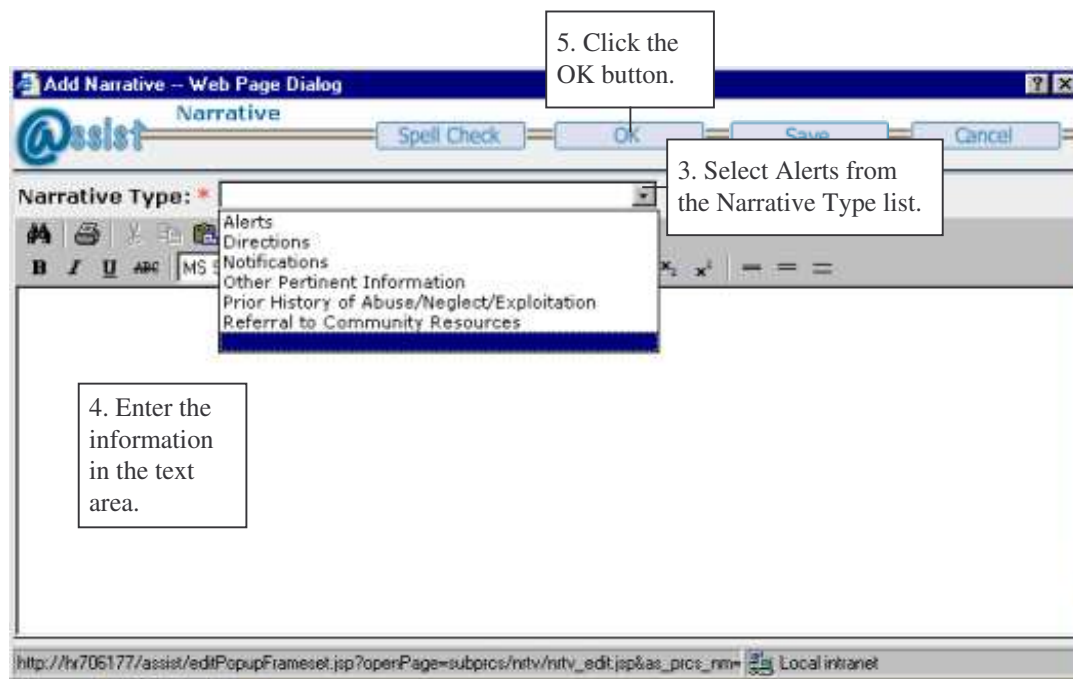
Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrillard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.

View History

Modified: 06/01/05 09:17 am

Worker: Bruce Strickler

2. Click the Add Narrative button.



Directions

Directions are used to provide workers with instructions on how to find a home. If the Reporter/Referral Source provides directions to the home, the intake worker should enter Directions to help the Assessment or Investigation worker locate the home.

Directions are entered and maintained from the Narrative page. To get to the Narrative page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select the type of work (Intake, Assessment, or Investigation) from the Sidebar.
3. Click the name of the piece of work you want to open.

You are now ready to open the Narrative page. This example involves an intake, but the steps are identical for other types of work.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Change Office June 1, 2005

Intakes

Case Name: T-Lorrillard, Phyllis
DHR #: Date: 11/30/2004 01:28 PM Worker: Robert Taylor

Quick Q & A: Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

1. Select Narrative from the Sidebar.

Intake Information

Intake Date: 11/30/2004 01:28 PM DHR#: Microfilm#:
Category: CPS Intake Type: Family Description: Single Female

Description of Incident/Situation/Request

Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrillard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.

Search ERD
Help Policy
HelpDesk

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 Change Office June 1, 2005

Intakes

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative**
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search
ERD

Help
Policy

HelpDesk

Case Name: T-Lorrilard, Phyllis

DHR #: **Date:** 11/30/2004 01:28 PM **Worker:** Robert Taylor

Narrative
Add Narrative

[View History](#)

Modified: 05/01/05 09:17 am
Worker: Bruce Strickler

Description of Incident/Situation/Request

Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lomland. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.

5. Click the OK button.

Add Narrative - Web Page Dialog
Narrative

Spell Check
OK
Save
Cancel

Narrative Type: *

- Alerts
- Directions
- Notifications
- Other Pertinent Information
- Prior History of Abuse/Neglect/Exploitation
- Referral to Community Resources

4. Enter the information in the text area.

3. Select Directions from the Narrative Type list.

http://h706177/assist/editPopupFrameset.jsp?openPage=subproc/nrtv/nrtv_edit.jsp&as_proc_nm= Local intranet

ASST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Change Office June 1, 2005

Intakes

Case Name: T-Lorrillard, Phyllis
DHR #: Date: 11/30/2004 01:28 PM Worker: Rob

Quick Q & A: Add Narrative Sort

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative**
- Recommendations
- Form/Correspondence
- Approvals
- Assignments

Search ERD

Help Policy

HelpDesk

Narrative

Directions

Take highway 57 out of town about five miles and take a right onto county road 100 and turn left.

View History
Modified: 06/01/05 10:22 am

Once a Directions narrative has been entered, this icon is displayed in the header for all pages.

You can update Directions information by clicking the Directions link. This opens the Directions in the Narrative page, where it may be edited.

The Directions narrative is displayed on the Narrative page.

Sorting and Filtering Narrative

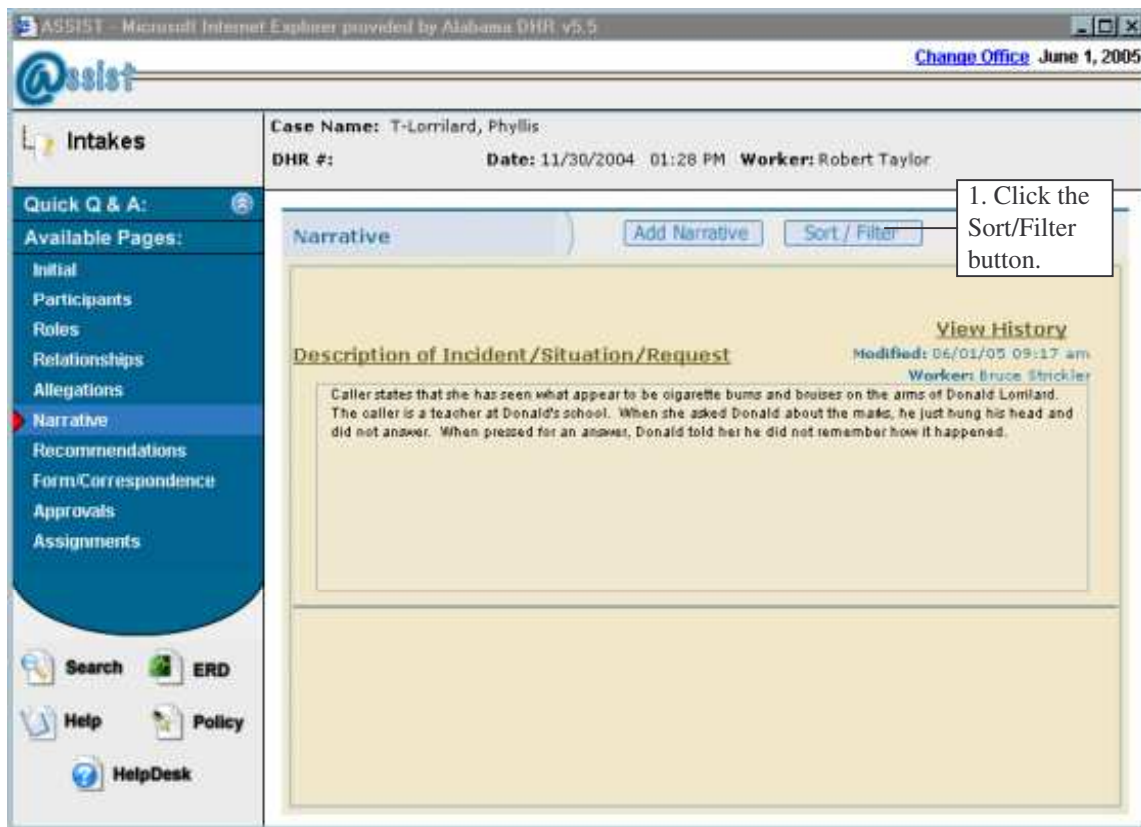
Purpose: ASSIST allows you to sort and filter the narrative displayed on the Narrative page. This makes it easier to find a particular piece of narrative. This is especially useful once you have entered a lot of different types of notes.

Overview: The Sort/Filter button on the Narrative page provides the means to select criteria for changing the order of notes and selecting a specific type of note to display. Narratives can be sorted in ascending or descending order by Narrative Type, Office, Date Entered, or Worker Name. You can select a Narrative Type by which to filter the narrative display. When you filter the narrative, only the selected narrative type is displayed. Sorting and filtering does not affect the way narrative appears when printed from Forms/Correspondence.

To open the Narrative page from the Summary Page:

1. Select Intakes, Investigations, or Assessments from the Sidebar.
2. Select Narrative from the Sidebar.

This example involves an intake, but Sort/Filter functions the same in investigations and assessments.



Sort Narrative — Web Page Dialog

Sort Narrative

3. Click the OK button.

OK Cancel

Sort Criteria

Narrative Type: Date Entered:

Office: Worker Name:

Filter Criteria

Narrative Type:

2a. If you want to Sort the narrative, select ASC (for ascending) or DESC (for descending) for the criteria by which you want to sort.

2b. If you want to Filter the narrative, select the Narrative Type you want displayed.

HelpDesk

http://hr706177/assist/editPopupFrameset.jsp?openPage=subpres/nrtv/nrtv_sort.jsp&pag Local intranet

Changing A Narrative Type

Purpose: Allows the narrative type for a narrative entry to be changed.

Overview: Narrative types can be changed on the Narrative Page. To open the Narrative page, open the piece of work and select Narrative from the Sidebar.

You are now ready to change a narrative type.

The screenshot shows the @asist web application in a Microsoft Internet Explorer browser window. The browser title is "ASIST - Microsoft Internet Explorer provided by Alabama DHR v5.5". The address bar shows "Change Office October 17, 2005".

The application interface includes a sidebar on the left with the following sections:

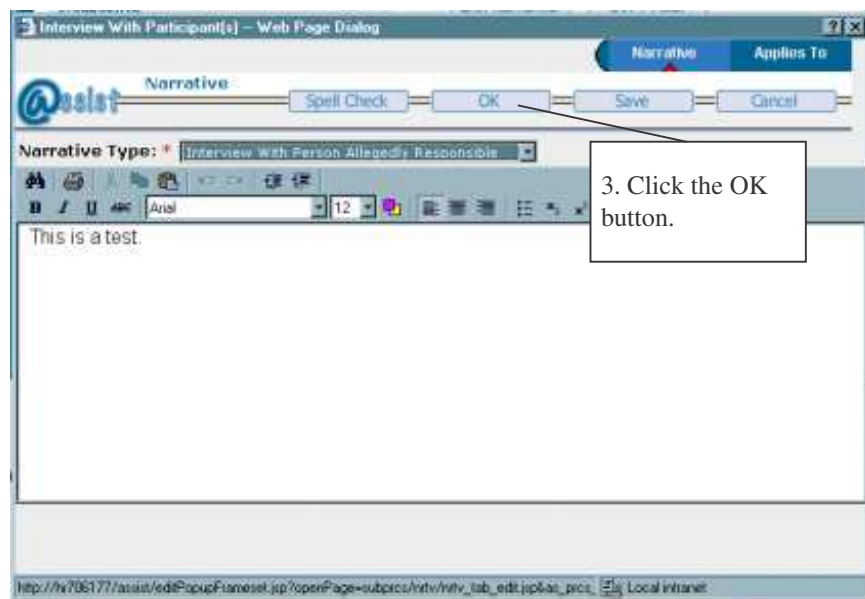
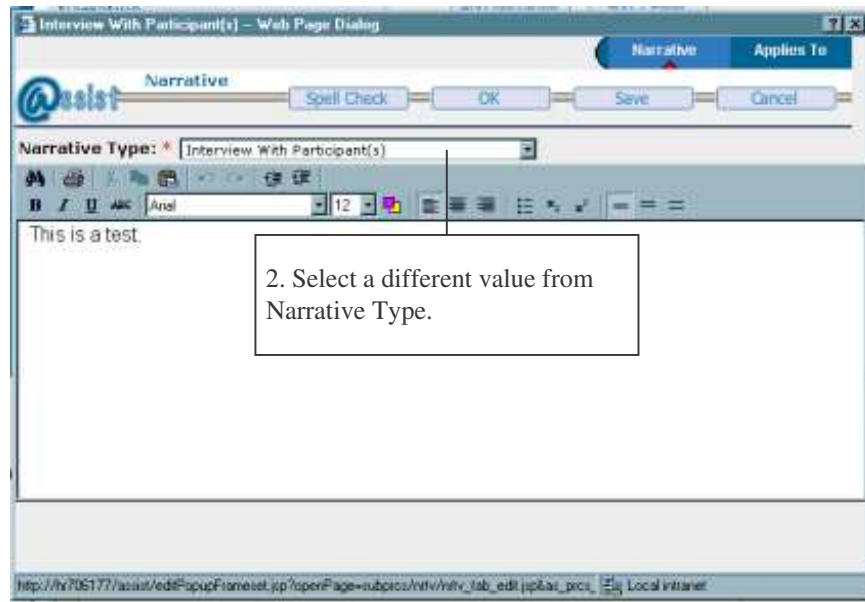
- Assessments**
- Quick Q & A:**
- Available Pages:**
 - Initial
 - Participants
 - Roles
 - Relationships
 - Allegations
 - Narrative** (highlighted with a red arrow)
 - Contributing Factors
 - Safety Threat
 - Safety Plan
 - Disposition
 - Checklist
- Tools:**
 - Search
 - ERD
 - Help
 - Policy
 - HelpDesk

The main content area is titled "Narrative" and contains two entries:

First Victim Contact
Contact Dates: 09/27/2005
Time: 10:30 am
Location: Home
Modified: 10/17/05 09:02 am
Worker: Bruce Strickler
Applies To: Miss Monica Anders
This is where you enter the text for the first contact with a person identified at risk. This is added text.

Interview With Participant(s)
Modified: 10/17/05 09:17 am
Worker: Bruce Strickler
Applies To:
This is a test.

A callout box with the text "1. Click the narrative type you want to change." points to the "Interview With Participant(s)" entry.



Viewing Narrative and Approval History

Purpose: ASSIST allows you to view the past versions of narrative and the approval activities for an intake, assessment, or investigation. For narrative, this provides a record of the original text entered by the worker, any changes made by the worker, and any changes made by the supervisor or manager. For approvals, this provides a record of the dates for approval requests, recalls, returns, and approvals.

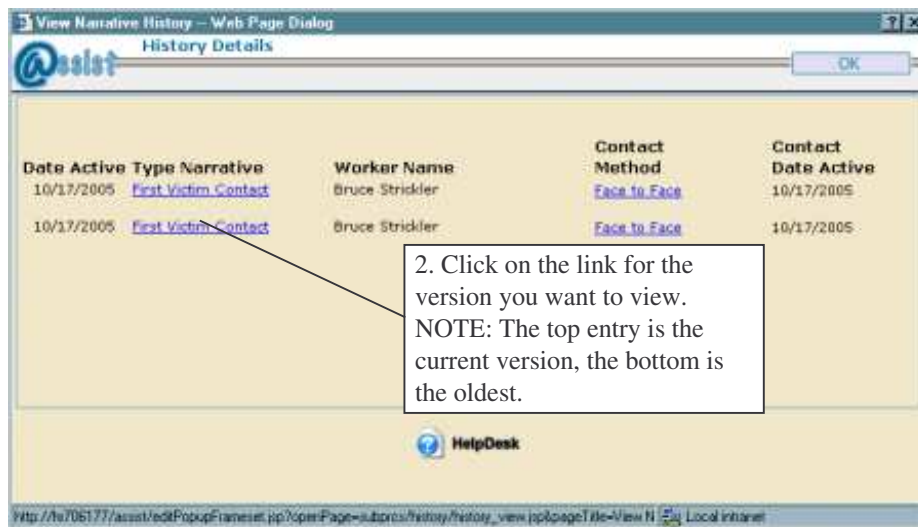
Overview: The View History function is available to all ASSIST users. It provides a record of narratives entered/changed and approval activity. Each entry displays the date of the entry/change and the name of the person who made it.

Narrative History

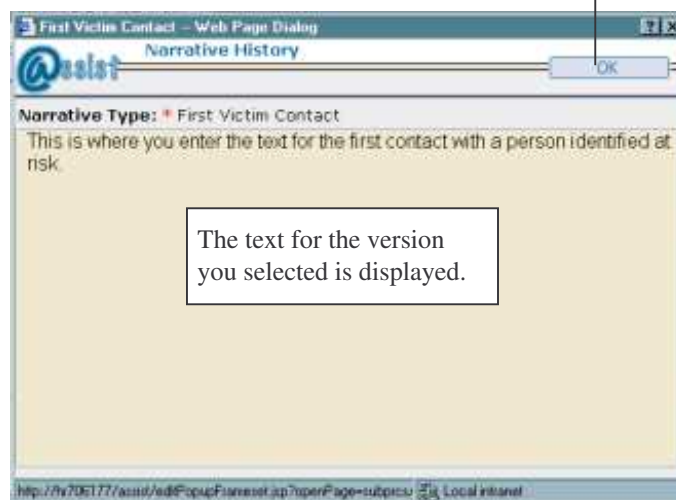
You view the history for a narrative from the Narrative page in the piece of work containing the narrative. To open the narrative page, open the piece of work containing the narrative and select Narrative from the Sidebar. Find the narrative for which you want to view the history.

You are now ready to view the narrative





3. Click the OK button to return to the History Details page.





Approval History

You view the approval history for an intake, assessment, or investigation from the Approvals page in an intake or the Decision page in an assessment or investigation. To open the Approvals or Decision page, open the piece of work containing the narrative and select Approvals (for an intake) or Decision (for an assessment or investigation) from the Sidebar.

You are now ready to view the approval history.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Change Office June 23, 2005

Assessments

Quick Q & A: 2

Available Pages:

- Contributing Factors
- Safety Threat
- Safety Plan
- Disposition
- Checklist
- Form/Correspondence
- Decision**
- Assignments
- Assessment History
- Case Participants

Case Name: Barnhill, Bernice Ruth

DHR #: 0000012345 Date: 06/23/2005 Primary Worker: Bruce Strickler

Decision

Decision Information

Restricted Reason: Unrestricted Response Time: 5 DAYS
Investigating Agency: DHR Referral Date:

DA Notifications

LEA Notifications

Approval Details

Decision: Pending
Worker: Bruce Strickler
Supervisor: Bruce Strickler
Date: 06/23/2005 Time: 10:14 am

Hearing/Review Information

Supervisor Comments

1. Click the View History button.

View History

Search ERD Help Policy HelpDesk

View Approval History - Web Page Dialog

History Details

These are assessment approval actions.

2. Click the OK button to return to the Approvals page.

Date Active	Approval Status	Worker Name
05/25/2005	Request Approval	Worker Fortysix
05/24/2005	Pending	Worker Fortysix
05/24/2005	Accept for Assessment	Trainer Supervisor Three
05/24/2005	Request Accept for Assessment	Worker Fortysix
05/24/2005	Recall	Worker Fortysix
05/24/2005	Request Accept for Assessment	Worker Fortysix
05/24/2005	Pending	Worker Fortysix

These are intake approval actions.

HelpDesk

The approval actions for the piece of work are displayed. The most recent action is on top and the oldest is on the bottom. For assessments and investigations, the approval actions for the intake are also shown.

http://assistrain/assist/editPopupFrameset.jsp?openPage=subjects/history/history_view.jsp&pageTitle=View & Local intranet

Forms and Correspondence

Purpose: Forms and Correspondence allows you to generate specific forms, reports, and correspondence from ASSIST.

Overview: The Forms and Correspondence page generates a variety of printable products. The product the page produces depends on the location of the page. For example, the Forms and Correspondence page you access from the Intake page has a different set of products from those produced by the Assessment Forms and Correspondence page.

You will access the Forms and Correspondence page by selecting Forms and Correspondence from the Sidebar. Please note: Some areas in ASSIST do not have any forms or correspondence. In those areas, the Forms and Correspondence option will not be displayed

Once on the Forms and Correspondence page, here is how you produce the documents:

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004

Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler

Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments

Form

Name
● [Interagency APS Report Referral](#)
Time Of Generation

1. Click the link for the document you want to produce.

● [Notice of Inappropriate Referral](#) PSAS0101
Time Of Generation

● [Rpt Of Adult Suspected Abused Neglected Exploited](#) PSAS0103
Time Of Generation
[09/02/2004 14:33:47](#)

The Forms and Correspondence available from your current location will be listed on the Forms and Correspondence page.

Search **ERD**
Help **Policy**
HelpDesk

User Entry -- Web Page Dialog

PSASO101 - Adult Interagency Referral

3. Click the OK button.

Adult Interagency Referral, Agency:

Adult Interagency Referral, Attention:

Comments:

HelpDesk

2. If the system needs information that is not maintained within the database, a user entry page opens. Enter or select the needed data.


http://hr706177/assist/editPopupFrameset.jsp?openPage=subpics/letters/PSASO102entry.jsp&pag Local intranet

The document opens in Adobe Acrobat Reader.


All of the functions provided by Adobe Acrobat Reader (print and save included) are available from the toolbar.

Do not print on pre-printed letterhead, ASSIST prints the letterhead for you.

PSAS0102 -- Web Page Dialog

 **MONTGOMERY COUNTY**
DEPARTMENT OF HUMAN RESOURCES

50 Ripley Street
P.O. Box 304000
Montgomery, AL 36130-4000
Telephone: (334)242-8410
Fax: (334)242-1310

 Mrs. Janet J. Murphy
Director

Confidential
09/02/2004

To: Department of Public Health
Attention: Elva Goldman, DPH - Div. of Health Care Facilities
Re: Adult Abuse, Neglect, and/or Exploitation Report
Case Name: James Allen Newton
DHR #: 123456789
Person Identified at Risk: Mr. James Allen Newton
Attached: Department of Human Resources Report of Adult Abuse/Neglect/Exploitation
From: Bruce Strickler
Adult Protective Services
Comments:

100% 1 of 1 8.5 x 11 in

Someone in your county office will be designated to maintain addresses, names, etc., used in the letterhead, signature elements and other standard information.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5 September 2, 2004

Intake

Quick Q & A:

Available Pages:

- Initial
- Participants
- Roles
- Relationships
- Allegations
- Narrative
- Recommendations
- Form/Correspondence**
- Approvals
- Assignments

Search

ERD

Help

Policy

HelpDesk

Case Name: T-Newton, James Allen

DHR #: 123456789 **Date:** 08/31/2004 08:39 AM **Worker:** Mr. Bruce Strickler

Form

Name	Code
<ul style="list-style-type: none"> ● Interagency APS Report Referral <p style="margin-left: 20px;">Time Of Generation 09/02/2004 14:46:36</p>	<div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>The date and time the document was generated (displayed or printed) is shown.</p> </div>
<ul style="list-style-type: none"> ● Notice of Inappropriate Referral <p style="margin-left: 20px;">Time Of Generation</p>	
<ul style="list-style-type: none"> ● Rpt Of Adult Suspected Abused Neglected Exploited <p style="margin-left: 20px;">Time Of Generation 09/02/2004 14:33:47</p>	<p>PSASO103</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Clicking on the date and time re-opens the saved document.</p> </div>

Accessing Forms and Correspondence for Intakes linked to an Assessment or Investigation

Once an intake has been linked to an assessment or investigation, you will not be able to access the intake's forms and correspondence from the intake. You can open the intake's forms and correspondence from the assessment's or investigation's Initial page. To access the Initial page from the main ASSIST menu, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select Assessments or Investigations from the Sidebar.
3. Click the name of the Assessment or Investigation.

The screenshot shows the ASSIST web application interface. The top header includes the ASSIST logo and the text 'ASSIST - Microsoft Internet Explorer provided by Alabama DHR, v3.5'. A 'Change Office' link and the date 'June 23, 2005' are also visible. The left sidebar contains a menu with 'Assessments' selected, and a list of 'Available Pages' including 'Initial', 'Participants', 'Roles', 'Relationships', 'Allegations', 'Narrative', 'Contributing Factors', 'Safety Threat', 'Safety Plan', 'Disposition', and 'Checklist'. The main content area displays the 'Initial' page for a case named 'Barnhill, Bernice Ruth'. The case details include 'DHR #: 0000012345', 'Date: 06/23/2005', and 'Primary Worker: Bruce Strickler'. The 'Assessment Information' section shows 'Received Date: 06/23/2005 10:02 AM', 'Response Time: 5 Days', 'Received Method: Phone', 'Category: CPS Intake', 'Microfilm #:', 'Disposition: Pending', 'Disposition Date:', 'Completion Date:', and 'Restricted Reason: Unrestricted'. Below this is a table with columns 'Factor' and 'Description'. The 'Related Intakes' section shows a table with columns 'Date', 'Type', and 'Description'. The table contains one row: '06/23/2005', 'Family', and 'Single Female'. A 'Delink' link is present next to the row. A callout box points to the 'Forms' link, with the text '1. Click the Forms link for the intake.'

Case Name: Barnhill, Bernice Ruth
DHR #: 0000012345 Date: 06/23/2005 Primary Worker: Bruce Strickler

Initial

Assessment Information [Modify Case Name/DHR #](#)

Received Date: 06/23/2005 10:02 AM Response Time: 5 Days
Received Method: Phone Category: CPS Intake
Microfilm #:
Disposition: Pending Disposition Date:
Completion Date: Restricted Reason: Unrestricted

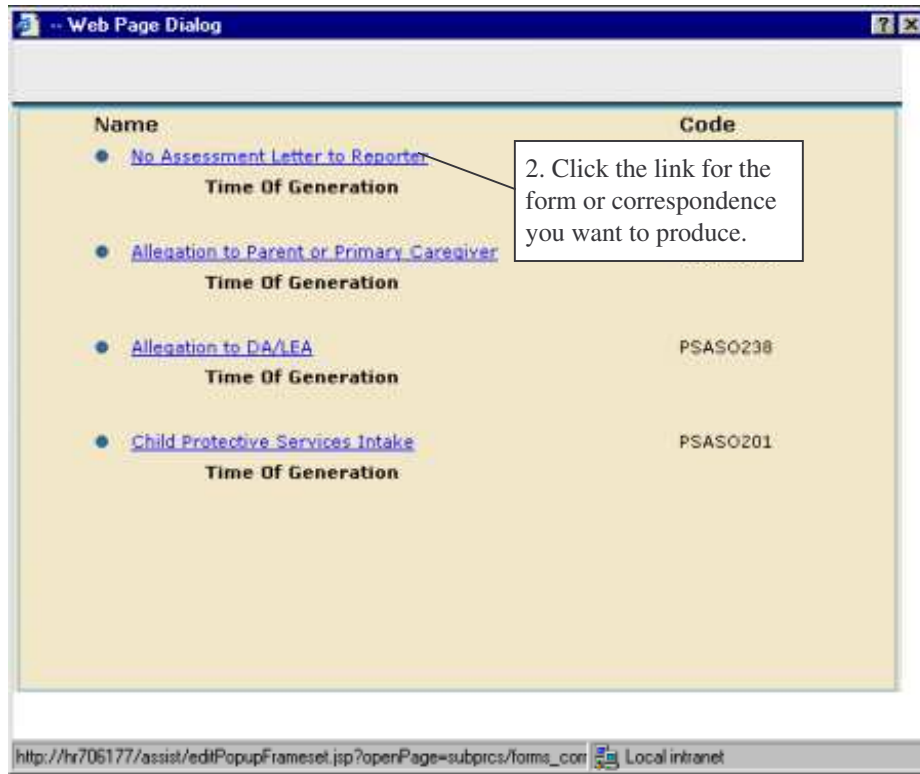
Factor	Description
--------	-------------

Related Intakes

Date	Type	Description
06/23/2005	Family	Single Female

[Delink](#) [Forms](#)

1. Click the Forms link for the intake.



Refer to the instructions for Forms and Correspondence beginning at step 2 for the rest of the steps.

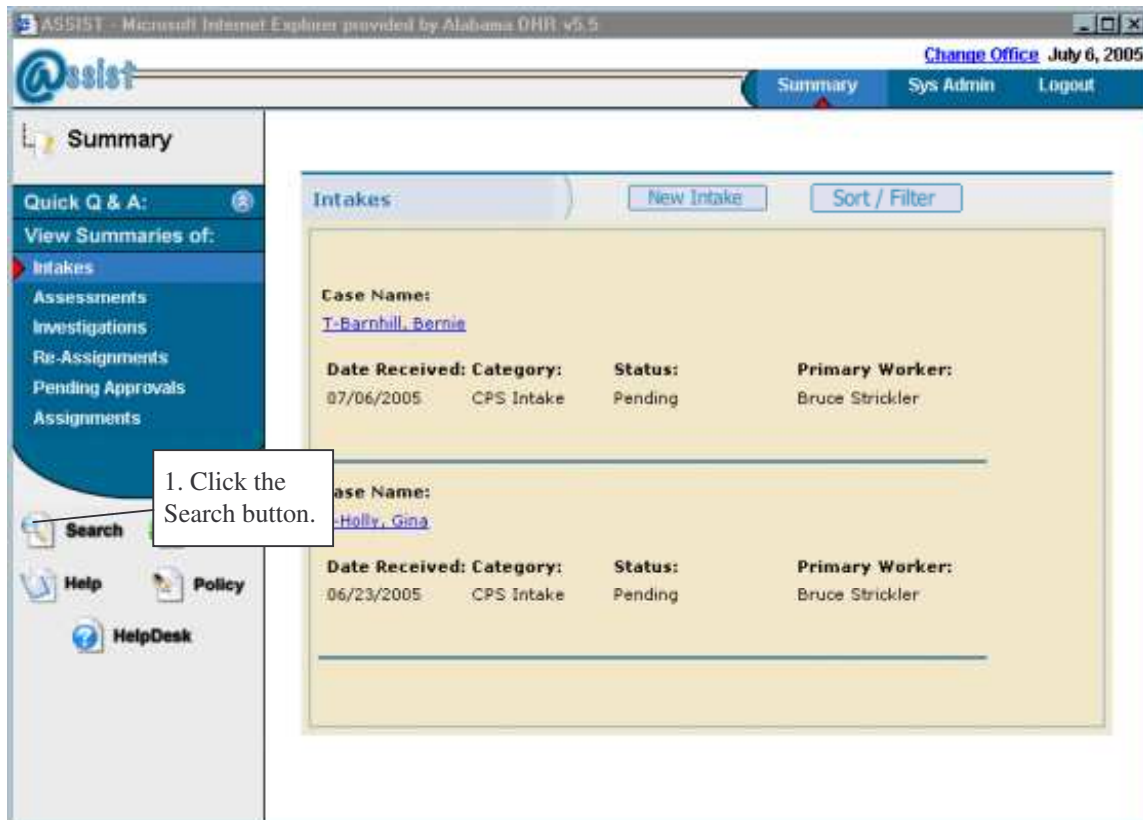
Merging Person Records

Purpose: The person merge function provides the means to combine duplicate records for the same person. **Only those specifically designated in their county office to have merge capability can perform merges.**

Overview: You may occasionally find that more than one record exists for the same person in ASSIST. Perhaps the person was entered under a different name. Maybe the worker who entered the second record did not complete a thorough search when they verified the person. No matter how the duplicate record was created, the desired goal is to only have one person record per person. Once a person record is merged into another, the remaining person replaces the merged person in all work to which they were linked. Also, the name from the merged person record is entered in the remaining person record as an Also Known As (AKA) name.

Person records are merged from the person record **that you want to keep**. You can open the person record from an intake, assessment, investigation, or search. The recommended procedure for merging person records follows:

Before you begin the actual merge process, it is recommended that you identify the person records by **Person ID**. By using the Person ID, you will know exactly which record is which, especially if the name is identical on the two records. In this example, the person record for Bernie Barnhill will be merged into the record of Bernice Barnhill.



Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

2. Select Person from the menu.

3. Enter the name for the record you want to remain after the merge.

4. Click the Search button.

Case Person Worker

Reset Search Cancel

Last Name: Barnhill First Name: Bernice

Roles: Roles: Person ID: Person ID:

Gender: Gender:

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Search Cancel

Last Name: Barnhill First Name: Bernice SSN: SSN:

Roles: Roles: Person ID: Person ID: DOB: DOB:

Gender: Gender:

Type	Name	Gender	Birth Date	County	Ad
PRSN -	Barnhill, Mrs. Bernice Ruth	Female	00/00/0000		

5. Click the name of the record you want to keep. If more than one record was returned by the search, you may have to open several to identify the one you want.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Person

Person Name: Ms. Bernice Ruth Barnhill
Gender: Female

Person ID: 2001295
Added Date: 06/24/2005

Available Pages:
Demographics
Identification
Life Events
Address/Phone
Activity
Merge

Activity Information

Case Name:
[Barnhill, Bernice Ruth](#)

Type:	Activity Date:	Status:	Disposition:
ASSESSMENT	06/23/2005	Pending	
Role:	County:	DHR Number:	
Person Allegedly Responsible	ASSIST	0000012345	

7. Close the Person Record.

6. Note the Person ID.

Search - Microsoft Internet Explorer provided by Alabama DHR

9. Enter the name for the record you want to **merge into** the retained record.

8. Click the Reset Button.

10. Click the Search button.

Case Person Worker

Reset Search Cancel

Last Name: Barnhill First Name: Bernie
 Roles: Person ID:
 Gender:

Type	Name	Gender	Birth Date	County	Ad
PRSN -	Barnhill , Ms. Bernice Ruth	Female	00/00/0000		

Search - Microsoft Internet Explorer provided by Alabama DHR v3.5

Case Person Worker

Reset Search Cancel

Last Name: Barnhill First Name: Bernie SSN:
 Roles: Person ID: DOB:
 Gender:

Type	Name	Gender	Birth Date	County	Ad
PRSN -	Barnhill , Ms. Bernie	Female	00/00/0000		

11. Click the name for the record you want to merge. If more than one record was returned, you may have to open several to identify the one you want.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Person

Person Name: Ms. Bernie Barnhill
Gender: Female
Person ID: 2001360
Added Date: 07/06/2005

Available Pages:

- Demographics
- Identification
- Life Events
- Address/Phone
- Activity**
- Merge

Activity Information

Case Name:
[Barnhill, Bernie](#)

Type:	Activity Date:	Status:	Disposition:
INTAKE	07/06/2005	Pending	
Role:	County:	DHR Number:	
	ASSIST		

12. Note the Person ID.

13. Close the Person Record.

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

14. Click the Reset Button.

16. Click the Search button.

15. Enter the Person ID for the record you want to RETAIN.

Last Name: First Name:
 Roles: Person ID:
 Gender:

Reset Search Cancel

Type	Name	Gender	Birth Date	County	Ad
PRSN -	Barnhill, Ms. Bernie	Female	00/00/0000		

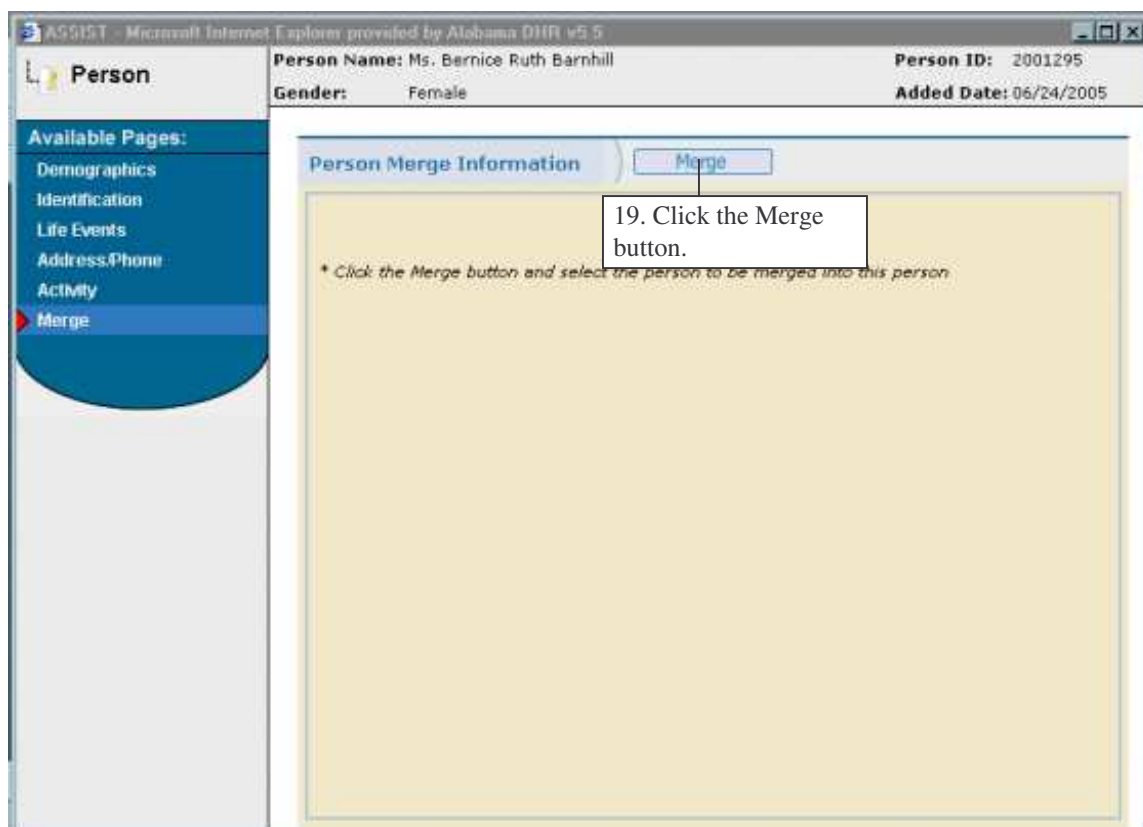
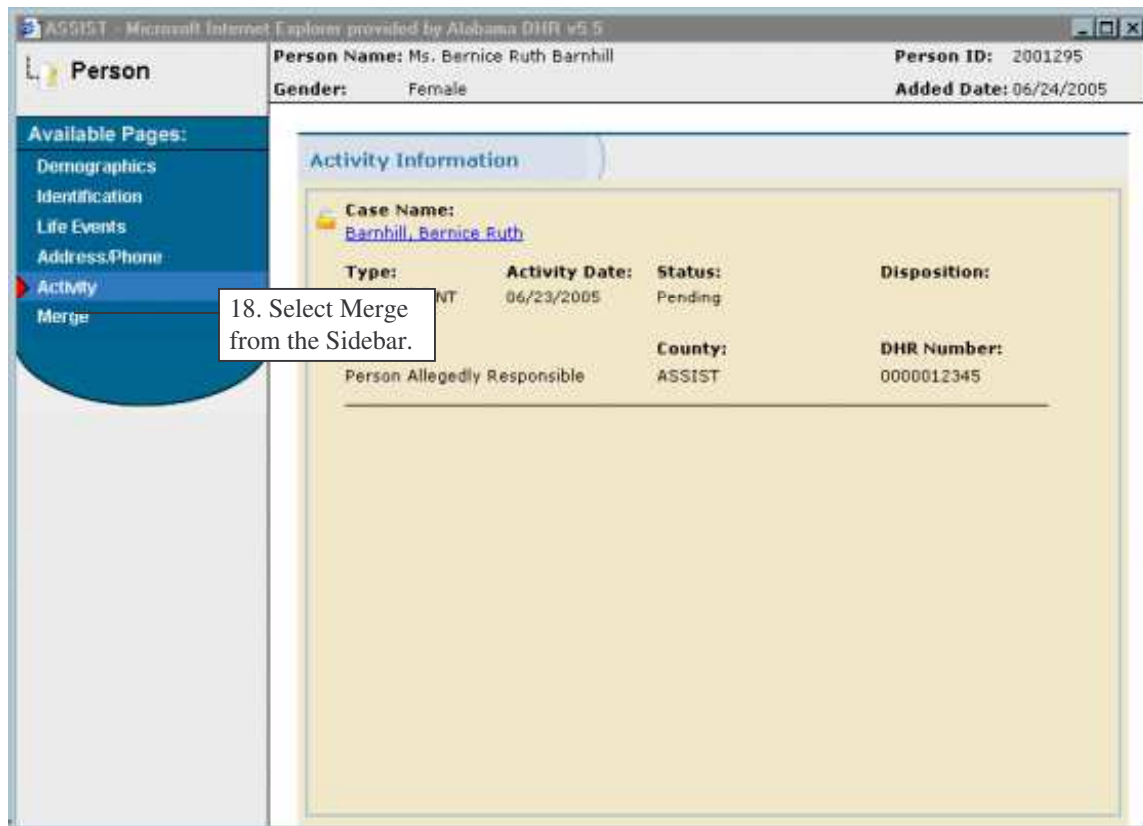
Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

17. Click the name to open the record.

Last Name: First Name: SSN:
 Roles: Person ID: DOB:
 Gender:

Reset Search Cancel

Type	Name	Gender	Birth Date	County	Ad
PRSN -	Barnhill, Ms. Bernice Ruth	Female	00/00/0000		



21. Click the Search button.

20. Enter the Person ID for the record you want to MERGE.

Person Search -- Web Page Dialog

Reset Search OK Cancel

Last Name: First Name: SSN:
Roles: Person ID: DOB:
Gender:

Type	Name	Gender	Birth Date	County
No matching records found				

Person Search - Web Page Dialog

Reset Search OK Cancel

Last Name: First Name:
 Roles: Person ID: 2001360
 Gender:

23. Click the OK button.

Type	Name	Gender	Birth Date	County
PRSN -	Barnhill, Ms. Bernie	Female	00/00/0000	

22. Select (highlight) the record by clicking it anywhere EXCEPT the name.

ASSIST - Microsoft Internet Explorer provided by Alabama DHHR v5.5

Person Name: Ms. Bernice Ruth Barnhill Person ID: 2001295
 Gender: Female Added Date: 06/24/2005

Available Pages:
 Demographics
 Identification
 Life Events
 Address/Phone
 Activity
 Merge

Person Merge Information Merge

Person Merged	Person Id	Merge Date	Worker
Ms. Bernie Barnhill	2001360	07/06/2005	Bruce Strickler

[Undo-Merge](#)

* Click the Merge button and select the person to be merged into this person.

The details of the merge are displayed on the Person Merge Information Page.

The merge can be undone by clicking the Undo-Merge link.

Merging Cases

Purpose: The case merge function provides the means to combine duplicate cases for the same person or family. **Only those specifically designated in their county office to have merge capability can perform merges.**

Overview: You may occasionally find that more than one case exists for the same person or family in ASSIST. Perhaps the case was entered under a different name. Maybe the supervisor who created the second case did not complete a thorough search when they accepted the intake. No matter how the duplicate case was created, the desired goal is to only have one case per person/family.

Cases are merged from the Search page. The recommended procedure for merging cases follows:

In this example, the case for Ann Lumpkin will be merged into the case for LouAnn Lumpkin.

The screenshot shows the ASSIST web application interface. The left sidebar contains a 'Summary' section with a 'Quick Q & A:' link and a 'View Summaries of:' dropdown menu. The dropdown menu is open, showing options: 'Intakes', 'Assessments', 'Investigations', 'Re-Assignments', 'Pending Approvals', and 'Assignments'. The 'Intakes' option is selected. Below the dropdown menu are links for 'Search', 'Help', 'Policy', and 'HelpDesk'. The main content area displays a list of cases under the 'Intakes' tab. The cases are listed in a table format with columns for 'Case Name', 'Date Received', 'Category', 'Status', and 'Primary Worker'. The cases are: 'T-Rattle, Bobby', 'T-Lorrilard, Phyllis', and 'T-McCarthy, Charlie'. A callout box points to the 'Search' button in the left sidebar with the text '1. Click the Search button.'

Case Name:	Date Received:	Category:	Status:	Primary Worker:
T-Rattle, Bobby	11/15/2004	AANE Intake	Pending	Robert Taylor
T-Lorrilard, Phyllis	11/30/2004	CPS Intake	Pending	Robert Taylor
T-McCarthy, Charlie				

Search - Microsoft Internet Explorer provided by Alabama DHR, v5.5

2. Enter the name for the case you want to remain after the merge.

3. Click the Search button.

Case Person Worker

Reset Search Cancel

Last Name: Lumpkin First Name: LouAnn

DHR Number: Office: Assist Id: Intake: ☐

Provider name:

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5

Case Person Worker

Reset Search Cancel

Last Name: Lumpkin First Name: LouAnn

DHR Number: Office: Assist Id: Provider name: Intake: ☐

Provider / Case Name	DHR Number	Office	Type	Status	Address
Lumpkin, LouAnn	0000012345	ASSIST Development	F	Open	111 First Street Montgomery, AL 36111

4. Click the case name.

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Cases

Case Name: Lumpkin, LouAnn
DHR #: 0000012345

Available Pages:

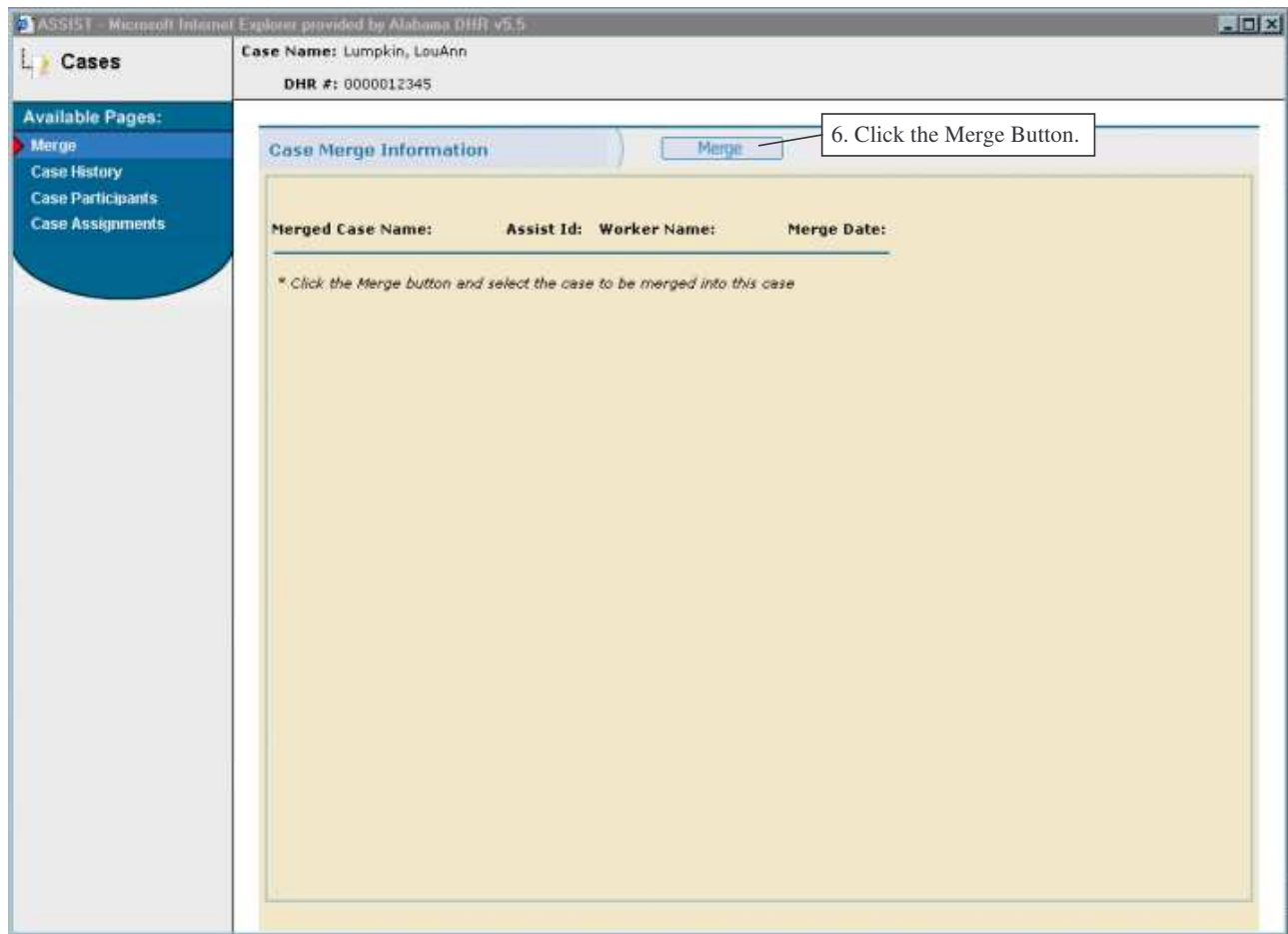
- Merge
- Case History
- Case Participants
- Case Assignments

5. Select Merge from the Sidebar.

Case History

Date: [08/16/05 07:48 AM](#)

Status:	County:	Primary Worker:
Pending	ASSIST Development	Bruce Strickler



8. Click the Search Button.

7. Enter the name for the case you want to merge into the retained case.

Case Search - Web Page Dialog

Reset Search OK Cancel

Last Name: Lumpkin First Name: Ann

DHR Number: Office: Assist Id:

Provider name: Intake: ☐

<http://assisttrain/assist/editPopupFrameset.jsp?openPage=prcs/search/caserearch.jsp&pageTitle=Case Search&=ui> Local intranet

10. Click the OK button.

Case Search -- Web Page Dialog

Reset Search OK Cancel

Last Name: Lumpkin First Name: Ann

DHR Number: Office: Assist Id:

Provider name: Intake: ☐

Provider / Case Name	DHR Number	Office	Type	Status
Lumpkin, Ann	0001234567	ASSIST Development	F	Open

9. Select the line for the case you want to merge.

<http://assisttrain/assist/editPopupFrameset.jsp?openPage=prcs/search/caserearch.jsp&pageTitle=Case Search&u> Local intranet

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5

Cases

Case Name: Lumpkin, LouAnn
DHR #: 0000012345

Available Pages:

- Merge
- Case History
- Case Participants
- Case Assignments

Case Merge Information

Merged Case Name:	Assist Id:	Worker Name:	Merge Date:
Ann Lumpkin	1003197	Bruce Strickler	08/16/2005

[Undo Merge](#)

* Click the Merge button and select the case to be merged into this case

The details of the merge are displayed on the Case Merge Information Page.

The merge can be undone by clicking the Undo Merge link.

Recommended Procedures for Obtaining Assistance

People who use ASSIST should try to obtain assistance from the most immediate level of help available. This will ensure that all users can receive the assistance they need as quickly as possible.

The levels of assistance in using ASSIST are:

Level 1 - User Guide/ASSIST System Help

Level 2 - County ASSIST Mentor

Level 3 - ASSIST Help Desk

The User Guide/ASSIST System Help

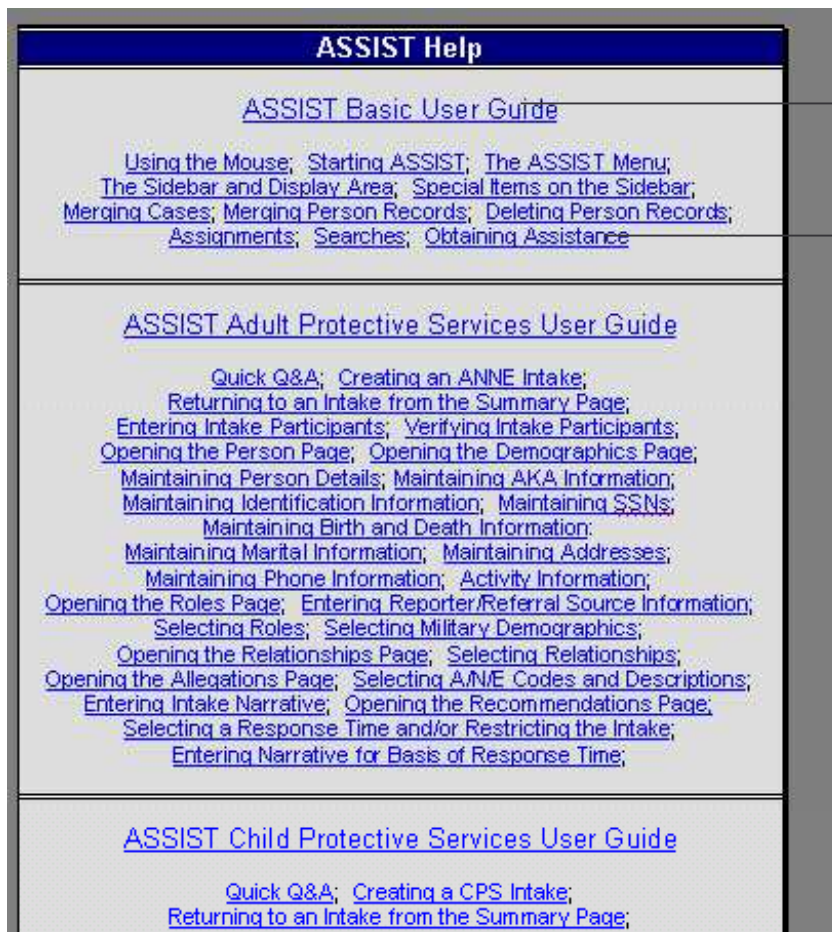
Every ASSIST user has access to the User Guide online. It provides step-by-step instructions for performing all of the tasks in ASSIST. It is made up of five volumes (see page 5, Introduction for details). It is also available on the DHR Intranet through the Online Documents shortcut through your ASSIST mentor.

The same information that is available from the user guide is also available from ASSIST Help. ASSIST Help provides access to each user guide as a whole or to individual sections of the user guide. To use ASSIST Help:



1. Click the Help button located under the Sidebar.

The ASSIST Help page opens.



2. Click the User Guide header to open the guide at the beginning of the document.

OR

Click a section title to go directly to that section.

County ASSIST Mentor

Your county ASSIST mentor has been provided extra ASSIST training to be able to perform more advanced tasks than the average worker. This does not make them ASSIST experts, but it does give them an advantage when trying to understand how to perform a task.

ASSIST Help Desk

If your mentor is not able to provide the help you need, they can contact the ASSIST Help Desk. The ASSIST Help Desk has people who have advanced training on ASSIST functionality. If they do not know the answer to a problem or question, they will be able to find the answer quickly. They will also know the answer the next time someone calls with the same question. The ASSIST Help Desk can be reached by phone from **7a.m. to 5p.m. Monday through Friday** at **1-800-429-9508 option #6**. If you are transferred to voice mail, make sure to leave your **name, office, telephone number (ATTNET preferred or include your area code)**, a **brief** description of the problem, and the **name of the intake, investigation, or assessment** involved.

ASSIST Help Desk Button

If the problem is a system error, you should send the request through the system. To send the Help Desk a message from ASSIST:

The screenshot shows a web browser window titled "ASSIST Helpdesk - Microsoft Internet Explorer provided by Alabama DHR v5.5" with a date of "September 2, 2004". The page has a header with the "@ssist" logo and a question mark icon. The main content area is titled "Helpdesk" and contains the text "This sends the previous page to the HelpDesk for analysis." followed by "Please enter your comments here...". Below this is a large text input field. A "Submit" button is located at the bottom of the form. Three numbered instructions are overlaid on the image: 1. Points to the "HelpDesk" button in the sidebar. 2. Points to the text input field. 3. Points to the "Submit" button.

1. Click the Help Desk button located under the Sidebar.

2. Enter a detailed description of what you were doing when the problem occurred.

3. Click the Submit button. This will send your message along with a capture of what was on your screen when you clicked the Help Desk button.

This method should only be used when a system error occurs because it sends detailed technical information to the Help Desk along with the comments you entered. Be sure to include your **name**, **office**, telephone number (**ATTNET preferred or include your area code**), a **brief** description of the problem, and the **name of the intake, investigation, or assessment** involved in the message.